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ABSTRACT

This book provides "how to" information for those who have never managed a fund-raising event for a college or university, and gives advice to help the experienced professional fund-raiser fine-tune traditional or new events. It covers the essential steps in event planning such as developing a realistic budget, and includes a budget planning checklist. Specific chapters discuss the following: (1) developing special events to meet specific roles; (2) matching the event to the institution; (3) determining the budget and paying the bills; (4) using volunteers; (5) pricing and selling the tickets and promoting the event; (6) selecting and positioning events that support the capital campaign; and (7) developing and implementing an effective post-event follow-up process. The book contains a 26-item bibliography covering areas of capital campaigns; etiquette and protocol; fund raising and special events; and marketing, promotion, and publicity. (GLR)

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Raising Money and Cultivating Donors Through Special Events

April L. Harris

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April L. Harris

Council for Advancement and Support of Education

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Contents

Foreword i
Peter McE. Buchanan

Preface iii
April L. Harris

Introduction v

1 Events Play Two Roles in Development 1

2 Choosing Your Fund-raising Event: A Primer 7

3 Paying the Bills 13

4 Volunteers 21

5 "Tickets, Please" 31

6 Publicity 39

7 Special Events that Support the Capital Campaign 45

8 Fund Raising Events Require an Action Follow-up 51

Bibliography 55

About the Author 57

Foreword

April Harris has done it again! Her first book for CASE, *Special Events: Planning for Success*, was a best-seller. It covered the nitty-gritty details of holding a special event, from setting your goals to paying the bills. *Raising Money and Cultivating Donors Through Special Events* is a companion volume. In response to many requests, Harris covers the vital role of special events in development.

Planning a special event is serious work. Special events are *not* just "parties"—occasions for fancy food and dress, entertainment and socializing. As Harris says in Chapter 1 of this book:

> Events must clearly communicate who, what, when, where, how, why, and so what. If people leave your event scratching their heads and wondering what it was all about, you have wasted time and money.

What kind of event is best for your institution? The choices are many—from sponsoring a big-name entertainer to hosting a black-tie benefit. *Raising Money and Cultivating Donors Through Special Events* will help you select those events best suited to your institution's needs and its constituency.

Harris covers that essential step in planning—building a budget based on fact—and she includes a budget planning checklist for your convenience. She helps you deal with those necessary but too-often nerve-wracking ingredients of the special event—volunteers. She advises you on how to price tickets and how to prepare the publicity that will sell them.

A special chapter covers "one of the most challenging and exciting opportunities in an event planner's career"—the capital campaign.

And finally, Harris reminds us, "Fund-raising events require an action follow-up."

If you know Harris' first book, you know her style: eminently readable and "user-friendly." She knows planning a fund-raising event can be intimidating, but she leads you through the process step by step.

Fund-raising special events play a critical role in presenting the needs of your institution—and your institution itself—to your most important supporters as well as to the general public. This book will help you learn to enjoy planning and holding the special events that can help your institution achieve its most important educational objectives.

Peter McE. Buchanan
CASE President
October 1991

6

Preface

Since the publication of *Special Events: Planning for Success* in 1988, many people have asked me for information about how special events fit into development and how to plan fund-raising events. I did not address fund-raising events in *Special Events* because the scope of that book would have permitted only a passing mention rather than the comprehensive treatment you will find in this volume.

Raising Money and Cultivating Donors Through Special Events seeks to answer the needs of development officers who must suddenly become event planners and event planners abruptly cast as fund raisers. I have translated into the context of higher education the special events fund-raising philosophies and techniques that have been successful for other nonprofit organizations.

This book is not intended to be an encyclopedic answer file; instead, use it to establish a common ground from which to develop and implement fund-raising events as important components of the advancement mix. I have not included pointers for managing the many nitty-gritty details of successful events. For that information, I hope you will read *Special Events: Planning for Success*.

I want to thank my Baylor College of Medicine colleague Carol V. Bryce for editing the initial version of my manuscript. In addition, I extend my appreciation to the many advancement professionals who have supported efforts to bring special events and special event planners into their rightful position as equal professional partners on alumni, development, public affairs, and university relations staffs. I am grateful to CASE for acknowledging the profession, for giving special events a national forum, and for building awareness of the importance of special events and of the people who plan them.

April L. Harris
Houston, Texas
October 1991

Introduction

Fund raising today is a crowded field with many different groups competing for donor dollars and often using sophisticated marketing techniques previously reserved for selling the latest consumer products. People are bombarded with funding requests from schools, social agencies, charities, environmental causes, religious groups, youth organizations, politicians, and other good causes.

Computers have made it possible for fund raisers to locate people who precisely fit a desired market segment. Prospects are then wooed with tailor-made packages of cultivation strategies (including special events), designed to best motivate them to make gifts.

Our alumni are attractive targets for other fund-raising entities because of their affluence, educational level, and community status. Recent Roper Organization survey information on charitable giving showed that most Americans feel overwhelmed by requests for donations. The survey also found that more than half of the respondents said they make gifts, but choose only one or two groups to support each year. The deciding factors were how well groups articulated their needs and how well their programs supported their missions and helped to achieve stated goals.

Which organizations will win the competition for donor dollars? Clearly, it will be the ones that best explain their cases, demonstrate how their programs support their missions and help to achieve goals, and do the best job of capturing the attention of busy individuals through effective marketing.

Thoughtfully conceived special events well-positioned in the development and public relations mix are one of the powerful tools needed to effectively communicate fund-raising messages in today's market. Fund-raising special events reap rewards by broadening the base of involvement through effective use of volunteers, by bringing constituents into a closer, more personal relationship with our institutions, and by ultimately translating involvement into contributions.

Chapter 1

Events Play Two Roles In Development

Special events play two main roles in fund raising—cultivation or "friend raising" and making money through the sale of tickets or other means. It can sometimes be difficult to define where friend raising stops and fund raising starts. Both types of events are part of a comprehensive development plan to support institutional fund-raising activities and, as such, become intertwined. While guests at a black-tie dinner to launch a capital campaign may not be asked for contributions that night, they understand that the request is inevitable. Is the event a friend raiser or a fund raiser?

On some campuses, glamorous events for which guests pay high prices are the focal points of the fund-raising year. Other institutions never charge current or prospective donors for any event, regardless of how elaborate it becomes.

A solid college or university development program cannot rely exclusively on special events to meet its fund-raising goals any more than friend-raising events can meet goals without proper development follow-up. Whatever the present mix of friend-raising and fund-raising events on your campus, finding the right balance is the key to success.

In finding that balance, you should select events that make the maximum impact on your target audience by being consistent with your institution's image, helping to achieve specific goals, showcasing resources that are unique to your institution, building good will, and matching available resources. And remember that all events must have an action follow-up. People want and need to know what you want them to do next. What should they expect? Is a development officer going to call? Will a pledge card arrive by mail? Do you want them to volunteer their time?

Events must clearly communicate who, what, when, where, how, why, and so what. If people leave your event scratching their heads and wondering what it was all about, you have wasted time and money.

Events aren't newcomers to fund raising; they have been around for a very long time. In days gone by, large fund-raising events called "benefits" or "galas" were, for the most part, the exclusive domain of arts organizations. They were a pleasant way to raise money from society's upper crust to support operas, ballets, orchestras, and art museums. Colleges and universities, on the other hand, raised money primarily through private meetings with influential persons of means and, on a small scale, through direct mail appeals. Today, the rules have changed.

As competition for private dollars increased, colleges and universities began to embrace the marketing techniques used by other nonprofit organizations. These include better targeting of appeals, more cultivation of donors, strengthening of volunteer organizations, and increased efforts to make giving a participatory activity rather than a spectator sport. This is where thoughtfully constructed, strategically planned special events can have a great impact on long-term fund-raising success.

What can special events do for you?

Special events are those occasions to which outsiders are invited for a closer look at the facilities, faculty, staff, students, and policies of an institution than is generally afforded on a daily basis. In fund raising, events can build a case, highlight a need, spotlight an accomplishment, lay the foundation for friendships, make money, and say "thank you." Even when an event is a money-making affair for which guests pay handsomely, it must still help accomplish long-term public relations goals.

There is just one valid reason to sponsor a special event: It supports and enhances institutional goals and mission, contributing to the accomplishment of objectives in academics, alumni relations, student recruitment, image building, and fund raising. Miscellaneous events held just to have a party or for a one-day success are self-defeating because they send mixed messages to your audience and sap resources that could be used more effectively in a well-planned public relations program.

Special events can help you educate, make a point, build friendships, enable your constituents to feel like "insiders," and foster a sense of community. Events are the most powerful tool in your public relations kit because they enable you to deliver your message personally to your target audience by showcasing your institution and its achievements and needs in time-effective, creative ways.

Solid PR planning is step one

Special events should be developed in relation to your institution's long-range goals in institutional advancement; and they should be strategically positioned for maximum impact in your annual public relations plan.

To do this you must first establish goals and objectives and then plan activities, including events, to accomplish them. By "master planning" the year, the campaign, or the anniversary celebration, you can position events to avoid duplication of effort and wasted money. Master planning also prevents you from bombarding the same target audience with too many messages and too many invitations.

Efficient planning helps you make the most of your time and money by selecting points in time to be highlighted and building messages toward them for emphasis and maximum impact. Having a plan also keeps you from being pulled off the track by day-to-day problems and temporary brush fires. A well-conceived plan can keep your staff and its resources focused. Determining priorities is no longer a problem because the master plan clearly maps the route. You can reject ideas that don't contribute to achieving your goals and save them for another time.

Master planning encompasses not only the goals and objectives of your office but those of the entire institution as well. All major special events should be coordinated campuswide by the chief public relations officer working through a committee composed of representatives of all campus offices that plan events. On most campuses this committee includes representatives of alumni, development, athletics, admissions, student affairs, the president's office, Greek life, and public affairs.

Meeting at least annually, preferably before the start of the academic year, the committee should function as an information clearinghouse. You can use it to gather information about the plans of others that may affect your own planning. Be alert for events that use the audience you plan to target or that duplicate your efforts. Learn about upcoming construction projects, the dates of board meetings, when the president will be out of town for an extended period, and the plans for the fall's biggest football weekend.

Failing to have an overview of what others are doing can be embarrassing. On one campus, the athletic boosters sponsored a gala evening with an auction to raise funds for athletics. Three weeks later, the friends of the library sponsored a gala evening with an auction to raise funds for the library. The same volunteer served as master of ceremonies for both auctions, the guest lists were virtually identical, and the auction items were similar. Auction sales at the second event suffered noticeably, and the tenor of the evening was not as festive. Perhaps the guests were suffering from *déjà vu*.

Discovering that another group is planning the same kind of event you are considering doesn't mean that you have to cancel your plans, but it may mean you need to revise them. In the example above, one group should have chosen another type of event on a date further in the future. Or, if both groups were committed to an auction, they should have worked together to develop different guest lists and to select different auction items.

Develop plans aimed at your audience

Armed with an overview of campus activities, you can select specific events that will accomplish the most for you. But first you must decide just what it is that you want to accomplish. Consider your goals and objectives. Do you want to cultivate new prospects? Do you need to persuade people to contribute to a specific campus project or scholarship fund? Do you need a focal point to announce a campaign?

Once you know what it is you want to do, you must match your *what* list with your *who* list—that is, define your audiences. Describe them in detail. Are they young, old, alumni, community business leaders, or retired faculty and staff? Are they affluent or mostly of modest means? What do these people like to do with their leisure time? How involved are they with your institution at present? Do a significant number of them live in your area, or are they scattered across the country? Are they donors and, if so, what is the average gift size? Does the target group include prominent opinion leaders?

Now, develop a case in support of what you want to accomplish, and craft messages that speak meaningfully and directly to the members of your target audience. Present information in ways that will motivate them to take the action you desire.

Develop a public relations plan that includes all of the different ways you intend to communicate your messages and position your special events to draw attention to key ideas and dates. As you select events, plan them to highlight features that are unique to your institution. Focus on the programs, people, and facilities that set your institution apart and for which

you are seeking support. Demonstrate how support of these areas benefits not only the community as a whole, but also the donor personally.

Making friends with your target audiences

"People give to people" is an axiom in fund raising. Especially if special events are new to your development program, plan some events that are not fund raisers. Seek a balance between cultivation, or friend-raising events, and those events intended to raise money.

People will lose interest if they feel that they must either buy tickets or make a donation every time there is an event. Some cultivation events need to be "free"—with no strings attached. The major objectives of a solid special events plan should be to build good will, educate your audience about your institution, and create an awareness of its role as an important community resource.

The amount of time and attention you must spend on friend-raising activities depends on the relationship you have already established with your constituents. If there have been no outreach programs in the past, you may discover that you have a lot of friend raising to do before you can begin fund raising. On the other hand, if the cause for which you are seeking support has been an active presence in the community, you may be ready to sponsor a fund-raising event that will meet with great success.

Friend-raising events are an integral part of your long-term development plan. They need not be elaborate and expensive. For example, inviting your constituents to an open house gives them a close-up view of your facilities, people, and programs.

By becoming actively involved with your constituents through special events, you will find a more receptive audience when you make fund-raising appeals. In the current climate of increased competition for philanthropic dollars, your institution should be perceived as an indispensable member of the community and worthy of support. In other words, the challenge is to demonstrate the benefits that your institution can give to its constituents by bringing it into a meaningful role in people's lives.

Accomplishing this hinges on one thing: involvement. When people are involved in an activity, their commitment to it and their willingness to see it succeed rise dramatically. In *Cash In! Funding and Promoting the Arts*, Alvin H. Reiss calls this process the "AIR Factor"—Arouse, Inform/Involve, and Reward. He says that successful programs first arouse the interest of people through activities and mailings that convey the organization's potential and build excitement. Next, the organization must inform and involve by "identifying the interests of particular target groups and combining them with areas of organizational interest."

Finally, the organization rewards people for their involvement by recognizing their gifts of time, talent, and dollars through appreciation events, printing their names in programs and newsletters, presenting them with a small token, and so on.

You can work through the many established groups on campus to increase awareness and build involvement. Start with the members of the various boards of trustees. Most colleges have a governing board to whom the president is accountable, as well as an alumni board, a foundation board, and advisory boards for everything from the various colleges to donor clubs and friends groups. The people who sit on these boards are chosen for their influence, status, and, usually, wealth. Because of their status, getting them actively involved can open doors for you and bring new people into your institution. Not the least of the good reasons to involve them is that, as leaders of your institution, their participation constitutes an endorsement in the eyes of the public.

Next, look around campus at the people you see and work with every day. These people have a vested interest in the success of the institution, and they represent a wealth of talent, resources, and people contacts. People who work on campus frequently welcome the opportunity to get involved with another campus activity or department, to meet new friends, and to use skills they don't get to exercise in their everyday assignments.

Now consider your donors, particularly those who are members of friends groups because they contributed to a specific area, but who have never been asked to participate in any activity. If you don't have any friends groups, it is simple to start one. Scan the list of people who have designated contributions to the area for which you wish to begin a group, and invite these donors to discuss the idea over afternoon tea. Choose a dynamic leader and stand back. An active friends group can become a potent public relations tool as members recruit new people, reach out to the community as club speakers, and sponsor involvement programs. Friends groups in turn form the nucleus of volunteers for special events.

Finally, recruit off campus, concentrating on people who are active in other community programs and on people who are past their child-rearing years. Retired faculty and staff are another enthusiastic resource.

Armed with a list of names of people to involve, fold them into your public relations plan and invite them for an insider's look at your institution, harnessing their energy and excitement in a well-planned volunteer program.

Chapter 2

Choosing Your Fund-raising Event: A Primer

You can choose from a great variety of events and ways in which they can be personalized for your institution. The Bibliography lists a selection of books about different kinds of events and themes. You can borrow another organization's idea, but remember the advice Alvin H. Reiss gives in *Cash In! Funding and Promoting the Arts*: "Adapt, don't adopt." An event that raised lots of money for one organization may not produce for you if it is at odds with your institution's image or doesn't address the interests and pocketbooks of your constituents.

Some types of events lend themselves well to certain groups. Black-tie events seem appropriate for the performing arts, while a professional tennis tournament to benefit athletics makes sense. The same tennis tournament offered as a benefit for the school of journalism doesn't present as neat a package.

When is a benefit a gala?

Some people use the terms "benefit" and "gala" interchangeably, but although a gala is a benefit, not all benefits are galas. A benefit is a fund-raising event at which guests pay to be entertained, and the proceeds from ticket sales are donated to a worthy cause. A gala is a benefit, but so are a fun run, a used book sale, and a world-premiere opera.

A gala is a dressy evening affair (frequently black tie), that includes a fine dinner, sometimes entertainment by a big Hollywood star, and dancing. Recently, galas have become more elaborate and may include "extras" like auctions.

The ball

The granddaddy of all fund-raising events, the ball has been raising money since the early 1800s. Particularly popular with arts organizations in big cities, it is frequently the glamorous centerpiece of an organization's annual social calendar. On campus, the ball is often used as a major donor club event. It is the classic example of a gala.

A true ball is always formal; ladies wear gowns and men are in black tie or, rarely these days, white tie. A scaled-down version that is popular on campus is the dinner dance. A dinner dance

is less formal than a ball, and dress is "black tie preferred" or "black tie optional."

Essential to a ball's success is a carefully selected theme that communicates your purpose and lends itself to the imagination in such a way that decorations, food, music, costumes, and performers become part of the evening's fantasy. A first-rate professional orchestra is a substantial but unavoidable cost of sponsoring a ball. Other major expenses include liquor, hors d'oeuvres, a formal meal with wines, and, frequently, entertainers such as strolling musicians, acrobats, or dancers, who reinforce the theme. A recent event in Houston featured a camel and its handler as part of a Moroccan theme.

Balls do not usually include a formal speaking program or deliver a heavy-hitting fundraising message. Instead, as soon as the guests are seated for dinner, the chair or the institution's president welcomes them, thanks them for coming, and states the purpose of the affair.

Balls need sponsors to help defray some of the costs or to underwrite entire portions of the evening. Also crucial to a ball's success is a large committee of socially prominent people working to plan the event and to sell tickets.

Expense is the main disadvantage of a ball. To be a financial success, a ball must attract a large crowd; therefore, a large pool of potential ticket purchasers is essential. Many colleges and universities are located in areas that are too small in population to pull a large enough audience.

On the plus side, balls remain very popular and quickly become established as annual events that can reap benefits in public relations and income.

Tributes, awards, and testimonials

These events raise money by recognizing an outstanding individual for his or her achievements and leadership. This format is probably the most common college and university fundraising event, although tributes often appear on campus as cultivation events paid for out of institutional budgets.

Tributes usually feature a meal followed by speeches and the presentation of plaques. When tributes are used to raise money, the proceeds from the sale of tickets benefit an area of special interest to the person being honored.

Tributes are comparatively inexpensive. They can take place on campus or in the hometown of the person being recognized, whichever will draw the largest audience.

The secret to a successful tribute is to honor an individual who is well-known and liked, has a wide circle of friends and associates, and has acknowledged status among business, community, and university constituencies. Tributes can also honor a celebrity. In either case, the person should be a supporter of the college or university and, preferably, have some association with the area to be benefited. A tribute to a prominent corporate CEO might benefit a scholarship in business administration; a tribute to a professional football player who is an alumnus, an athletic scholarship.

When the individual is a community or business leader, people will buy tickets out of a sense of admiration, obligation, or loyalty, or for political reasons. This means that the honoree must be someone who is widely respected and has a good reputation. Plan to sell tickets to his or her business and civic associates, employees, public officials, local dignitaries, and friends and family.

Tribute programs usually employ an after-dinner speaker, who speaks on a topic of interest to the honored guest, rather than delivering a eulogistic recitation of that person's good deeds.

Next, include remarks from the college or university president or another top adminis-

trator mentioning the reasons the person is being honored, followed by presentation of the award and an acceptance speech.

A variation of the tribute is the "roast," where a panel of the victim's friends poke fun at him or her by dredging up humorous anecdotes and exploits. A word of caution: Roasts can quickly border on bad taste, and unless the incidents are widely known, much of the audience can be left in the dark.

Tributes can provide a vehicle for the presentation of an award that not only generates funds but, because of the stature of the person being honored, focuses a public spotlight on your institution. Tributes create favorable publicity, building good will in the community and bringing prestige to your institution by association with highly respected people. Many institutions use tributes to present awards such as a "Distinguished Alumnus Award."

A tribute can backfire when the popularity or power of the honored guest has been overestimated, or when a scandal involving the honoree comes to light immediately before the event is to be held.

Entertainers

Singers, comedians, lecturers, dance troupes, musical groups, and theater performers fall into this category. Seemingly very simple, the event makes money by selling out the house. The income, less expenses, is then returned to the organization. But for the unsuspecting, the road from booking the event to paying the last bill can be full of pitfalls.

While hiring a big-name entertainer for a concert may seem like an easy way to make money, you need skill and knowledge to negotiate contracts; work with agents, unions, and promoters; secure an appropriate facility; arrange technical needs such as sound, lights, and special staging; deal with security and liability insurance needs; and oversee an orderly ticket sale. You also need a hefty budget to invest upfront for rental of a theater or an auditorium, to pay insurance premiums and deposits, and to make partial payments on contracts.

On the other hand, entertainers can generate masses of good publicity for your institution. They can draw a large crowd easily, particularly if you are in an area that is not a frequent stop on concert circuits or where people rarely have the opportunity to see productions like an off-Broadway play.

Here are some fundamentals for success:

- Know your audience and choose entertainment that will appeal to them. Chances are, a rock group that the students loved would not be a big hit in your Parents' Day show.
- Know the going rate for similar tickets in your area. Your show must be competitively priced to sell.
- Make sure that the same show will not be offered within easy driving distance of your campus for a minimum of one year before your date.
- Have all contracts reviewed by an attorney and figure the costs of extras stipulated in the contract rider before deciding whether you can afford it. Beware of hidden expenses such as advertising, ticket printing, expensive sound and lighting systems, and extra personnel.
- Begin the selection process at least a year in advance. Be prepared to negotiate, and keep negotiations confidential.

Dinner and entertainment

This hybrid of dinner dance and professional entertainment event makes a particularly nice event for major donors and those times when you need a classy, expensive presentation.

After a formal dinner, the audience sees a special entertainment usually created just for them. It might be a one-time performance or a preview of a performer's longer engagement in your town or on your campus; or it might be a lecture by a distinguished author or a politician. Also successful in this setting is a play preview, a concert by a jazz ensemble, or a presentation of classical music.

This event appeals because of its exclusivity. Tickets are sold to a limited number of patrons on a one-time basis and will not be offered again. On one campus, an alumnus who had become an opera star in New York City was returning to give a series of performances in the area. Event planners arranged a major donor evening during which the performer sang, discussed techniques, and told "insider" stories about opera. It was a mesmerizing, once-in-a-lifetime experience for the donors and brought in a substantial contribution to the university's school of music.

You can vary dinner and entertainment events in an infinite number of ways by adding dessert and a chance to meet the entertainers after the performance, beginning with cocktails and ending with a midnight buffet, or including smaller private receptions for patron-level ticket-buyers.

You can use the same room for the dinner and the entertainment event with guests viewing the presentation from their dinner seats nightclub style, or you may need to use two separate venues.

Dinner and entertainment events are expensive because not only must you cover the usual expenses associated with a dinner, but also those of staging an entertainment.

Auctions and casino gambling

These relative newcomers to the standard repertoire of fund-raising events have become very popular in recent years. Auctions and casinos are frequently linked in the same event. Guests may gamble with play money, which is later used to "purchase" some of the donated prizes during an auction. Another feature often found with these events is a raffle of a high-ticket, luxury item such as a sports car, a trip to an exotic destination, or expensive jewelry.

Auctions should raise a substantial amount of money. The best auctions offer goods that are unique and not readily available such as antiques, fine wines, collectibles, or art. Avoid auctioning everyday things that your donors can easily buy elsewhere.

Fund-raising auctions use donated goods so that all the profit goes to the institution. The sale should be conducted by a professional auctioneer who is skilled at keeping things moving and getting the highest price. Also popular are silent auctions that permit guests to examine the goods on display and write bids on special cards.

In an auction, money is made and expenses are paid from the sale of items, but when you combine an auction with dinner and other entertainment, you must sell tickets. For a comprehensive how-to manual on running an auction, consult *The Auction Book* by Betsy Beatty and Libby Kirkpatrick.

Many guests find a long auction boring, particularly when auction items are of general interest rather than exclusive offerings that draw serious collectors. To remedy this, planners look for other enticements, such as casino gambling.

In this format, auction items are donated and sold as usual, but some are set aside to be "purchased" with the scrip or pretend money won at the gaming tables. Each guest receives an amount of scrip as part of the ticket cost. The casino is open before the auction begins and adds fun and builds excitement as guests attempt to amass "fortunes" to spend during the auction. The casino increases the money you raise as guests purchase additional scrip for cash from roving cashiers.

Casino gambling, even with pretend money, is illegal in many states. If you want to hold this kind of event, check state statutes first. If a casino is not illegal in your state, hire a professional company to supply the tables, game pieces, and croupiers. Enlist volunteers or staff members to be cashiers.

One drawback to a casino is that participants who regularly frequent Las Vegas may expect the tables and the rules to be the same as they are there. The second problem is that people tend to stay at one table, and mingling suffers. Guests who do not know how to play may feel intimidated and quickly lose interest. The crowd may dwindle before the auction portion of the event gets under way, and you may receive a less than enthusiastic response to your invitation next year.

Combination casino and auction events are expensive and require a large facility and strong committees to secure donated auction items and to sell tickets.

Raffles

A raffle is another popular "add-on" that is often featured at auctions and casino events. A raffle should feature a highly desirable donated prize for which a limited number of tickets are sold. Raffles frequently include drawings for numerous smaller but just as desirable prizes. Some organizations sell tickets in advance for as much as several hundred dollars when the prize is something substantial, like a car.

While raffles can generate cash for very little effort, guests may complain about being solicited for a raffle ticket when they have already purchased an event ticket.

Never run a raffle unless the prize is donated, since the chances of selling enough tickets to recoup the item cost are small. Raffles are illegal in some states, and United States law prohibits selling raffle tickets through the mail. The money spent on raffle tickets is not deductible as a charitable contribution for federal income tax purposes, and guests should know this before they buy a ticket.

Food events

Secular versions of the traditional church pancake supper, food events haven't changed much over the years. Today, as in years past, you still get good food and fellowship for the price of a ticket, but the food is likely to be trendy, sophisticated, and offered up with panache such as the black-tie gourmet event held recently in the aisles of a supermarket. Perennial favorites because people always like to eat and socialize, food events usually focus on a theme such as chocolate, international cuisine, or exotic new creations by area chefs. Some feature competitions between local celebrities or chefs.

In Houston, Texas, the Girl Scouts of America sponsor a very successful food event each year to promote cookie sales. Girl Scouts work with local chefs to create fanciful new des-

serts using Girl Scout cookies as ingredients. The creations are judged, and the desserts featured in a tasting. The Girl Scouts benefit from the event, and cookie sales get a boost from the newspaper publicity.

While food events are easy, fun, and relatively inexpensive, the challenge to college and university event planners is to find ways to incorporate them, as the Girl Scouts did, so that they have a logical tie-in to the institution and help achieve its goals.

Preview parties

These are special gatherings for special people presented with the intention of boosting income, accomplishing public relations goals, and giving a shot in the arm to the publicity for an upcoming major event. Preview parties are held before something prestigious that is about to happen on a campus becomes available for all to see. These parties offer donors and VIPs a sneak preview of a fabulous art exhibit, a world premiere of a movie produced by an alumnus, the first peek at a play that will open on campus, or the chance to hear the work of a prominent musician before the general public can hear it.

Tickets for these exclusive events have a substantial price tag. Preview parties are a great fringe benefit for members of friends groups and other important donors. One university has built its preview party before the annual student art show and sale into such a prestigious, fun affair that people contribute to the Friends of Art just so they can buy preview tickets. All the proceeds of the preview party go to the art scholarship fund.

Preview parties can be a simple reception or an elaborate formal affair. (See Chapter 5 for more about preview parties.)

Kickoff events

Kickoff events focus attention on the fact that you are about to do something out of the ordinary such as launch a capital campaign, begin an anniversary year, or undertake a major project. Used primarily as public relations tools, kickoff events announce details of your plans, build enthusiasm and support, help recruit people to serve as volunteers, and generate valuable publicity.

You can use kickoffs to raise money, but they are usually cultivation events and guests are not charged.

Although kickoff events can take many different forms, they should convey the theme, message, and purpose of the upcoming major happenings in an unmistakable way.

Build kickoff events around obvious hooks such as a groundbreaking if your campaign will raise money for a building's construction costs, or the founding date of the institution if you are celebrating an anniversary year. Stage important parts of the event to be photogenic and involve as many prominent VIPs as possible so that you increase the chances of getting a picture in the newspaper or a clip on the evening news. See Chapter 7 for how to make the most of kickoff events and fit them meaningfully into your public relations plan.

While every college and university has its own menu of events that are traditional on its campus, most fit into one or another of these categories. What is important is not how many or which kinds of events you have, but how well they represent your institution and appeal to the interests and concerns of your constituencies.

Chapter 3

Paying the Bills

Budgeting for special events is always part guess and part gamble. Events grow and change between concept and implementation; prices of food fluctuate; and the guest list can balloon at the last minute. There never seems to be enough money to do everything you would like to do. Nevertheless, you need to build a budget and stick to it. When an event is intended to make money, this task becomes paramount.

Step one is to build a budget based on facts. Once you have determined the type and scope of your event, gather actual costs from all suppliers. Don't forget to include expensive but hidden costs, such as liability insurance, overtime for workers, and transportation for guests if needed. (You can use the budget planning checklist at the end of this chapter to itemize your costs.)

If you are having a cultivation event that will be paid for out of university or foundation resources, you need to determine whether the projected costs are affordable and scale plans downward if necessary. If you are contemplating a money-making event, your budget planning work has just begun.

How much needs to be raised?

The extra step in budgeting for fund-raising events is knowing how much money you need to raise and factoring this amount into the overall budgeting formula. This, in turn, determines the number of tickets you need to sell and the price per ticket.

You should have a firm fund-raising goal before event planning begins. In fact, the type, scope, and focus of the event will be shaped in large part by this number. If your goal is to raise $5,000 for the School of Music, a $100-a-plate dinner and entertainment for 50 people will suffice. If the goal is to raise $50,000 for music, not only is a much larger event needed, but costs will also escalate dramatically, making a simple $100 per person ticket formula unlikely to net the cash you need.

Once the fund-raising goal is set, to figure out how much you will need to cover all expenses and meet the goal, follow these steps:

1. Select a type of event that will best appeal to your target audience.
2. Research the costs of this event.
3. Add the fund-raising goal to the event costs.

Now is the time for pragmatic decision making. Consider the total: Is it realistic to attempt to reach it with the kind of event you have in mind? Remember that income will be limited by the size of the space available to hold the event and by the number of prospects in your target audience.

Carefully consider what the cost per ticket would be. Are people in your area able and willing to spend that much? Local custom, that is the precedent that exists for fund-raising events in your area and for your institution, has a lot to do with whether your tickets will be coveted or shunned. In some locales, $100 per ticket is normal and acceptable; in others, $50 per ticket may price your event out of the market. An example of this on a grand scale was the recent boycott by Washington, DC, socialites of a $3,500 per person benefit dinner dance with Princess Diana. The price tag was deemed too high even by Washington standards, ticket sales flopped, and the event failed to meet its fund-raising goal.

One successful event planner suggests using the cost of an evening out in your area, or in the nearest city, as a guide. She recommends tallying dinner and drinks at a first-class restaurant and entertainment, such as a play, concert, or dancing to a big-name band, and then adding 50 to 65 percent to this cost. If your projected ticket price is close to this mark, your chances for success are excellent. If you are far above it, reconsider your plans or scale down by eliminating some extras such as custom-made favors or expensive flowers like roses. A rule of thumb for fund-raising events is that expenses to stage the event should not exceed 30 percent of your total budget.

Support for fund-raising events builds over time. The first year for an event is not likely to be its biggest. The most successful fund-raising events have a track record and acquire a reputation as being the socially "in" thing to do. Therefore, in your first year, particularly if people in your area are not used to attending benefits, be conservative when you decide ticket prices—you can always raise them next year.

Getting help from your friends

To ensure fund-raising success and to maximize proceeds to the institution from ticket sales, many fund-raising events depend on corporate sponsorship. Corporate sponsorship can undergird the event's finances and mean the difference between a grand event and an everyday one. Sponsorship may cover all of the event's major expenses, or it may be donations of gifts-in-kind. Corporations often purchase "sponsor tables" or blocks of tickets at a substantial price. These tickets may be used by guests of the corporation or be donated back to the event.

Corporate sponsorship of fund-raising events grew dramatically throughout the 1980s and is heavily used by fund raisers for the arts and by organizations who sponsor events to benefit humanitarian or civic causes. Corporations are willing to make such gifts because they help build a positive public image and provide an entree to well-educated, affluent people who are not only potential consumers of corporate products, but are also likely to be community opinion leaders.

Support for colleges and universities is attractive because these institutions produce the corporate personnel of the future, and it is good for the corporate image to be associated with higher education's traditional goals of teaching, research, and public service. Because most corporations give locally, sponsorship also helps build a vibrant, thriving community, creating an atmosphere that helps keep employees satisfied in their private lives and reduces employee turnover.

The bottom line is this: Corporations become event sponsors because it is good business. Therefore package your request for sponsorship so that it clearly delineates the benefits to the corporation; strive to match corporate interest and purpose with that of your own.

For example, asking a pet food manufacturer to sponsor your veterinary college's dog show has a better chance of success than approaching a greeting card company with the same request. Conversely, be sure the sponsor's image is one that will enhance your own. Recently, a public relations brouhaha occurred when it was discovered that a pediatric hospital was to benefit from a motorcycle racing event that was sponsored by cigarette and beer companies. Such an absurd juxtaposition of organizations created a media flap and spawned a major public relations problem for the hospital.

While sponsorship can involve an outright gift of cash, corporations are more likely to sponsor a specific budget item such as the cost of food, invitations, or even the liability insurance premium. For this reason, you may need several sponsors.

Focus on the big picture

Some event planners who arrange large galas for arts organizations follow the fund-raising philosophy that an organization should never spend any of its own money to sponsor an event. When an event is 100 percent underwritten, 100 percent of the proceeds can be contributed to the cause. Planners who subscribe to this philosophy depend on hefty corporate contributions to make their events possible.

While 100 percent sponsorship is a planner's dream come true, most college- or university-sponsored fund-raising events rely on partial sponsorship. Unlike arts and community organizations which can achieve 100 percent sponsorship because they are seeking one-time corporate support for a special project, the ongoing, multiple fund-raising needs of a college or university dictate that the institution regularly seek large corporate gifts for purposes other than sponsorship of events. Because of this long-term relationship, event planners may have to keep hands off to protect the potential for future, more significant corporate gifts.

For this reason, you should never approach a corporation without clearance from your development office. There may be other proposals in the works, or you may endanger a larger, more important gift to your institution. Most institutions have a development officer in charge of corporate giving who coordinates all requests. He or she may know what approaches are likely to be successful with the particular corporation or may suggest other sources of support.

Making the request

Start early in your quest for sponsors. As soon as event plans are firm, begin to seek a good match for sponsorship. Because the biggest benefit you can offer sponsors is the publicity they will receive as the event is promoted, you need to line up sponsors before any publicity is released or invitations are printed. It's much harder to find sponsors once the opportunity for maximum publicity has passed.

Many corporations have a written contributions policy. It details the corporate philosophy on philanthropy, the types of causes the company wants to support, the types of awards it will make, giving priorities, and procedures to follow to submit a request.

If you are considering an approach to a corporation, ask for a copy of its policy first. If a funding request for your event seems to fit, prepare a sponsorship proposal. Begin by clearly defining the purpose and goals of your event. Next, explain the demographics of your target audience. Define the public relations benefits for both your institution and the corporation,

and demonstrate the appropriateness of the event to the corporation's objectives. Itemize your funding needs and their costs, and tell the benefits the sponsor will receive at different levels of support. Include as additional documentation the proposed budget, the volunteer structure, the planning timetable, and a brief description of the qualifications of the staff responsible for organizing and promoting the event. Package these materials in a concise way, and write a cover letter stating your case.

While many corporations have a staff member responsible for corporate giving, the most effective way to achieve success is to go directly to the top. Arrange a meeting with the highest corporate executive possible, and deliver these materials in person. Take your top volunteers with you. If you don't have the clout to arrange a face-to-face meeting, ask an influential person (a volunteer, perhaps, or your institution's president) to provide an introduction or to accompany you.

Conduct a brief meeting—15 minutes to half an hour maximum—to present your request, and then be prepared to wait three or more weeks for an answer. Most likely you will need to make several follow-up phone calls to keep your proposal moving. In the meantime, present your case to other possible sponsors as well.

Don't just think in terms of cash

Sponsorship can take many forms. Think first of asking for free professional advice from corporate executives, particularly if you have no established relationship with a company. Research shows that many successful corporate-university relationships have resulted from involving corporate personnel with university people and activities. Much corporate giving is directed to causes for which the corporate CEO feels an affinity. One way to develop such an affinity is to ask for a "loaned executive" to serve on your planning committee. For example, corporate employees in advertising, marketing, public relations, or graphic design can provide valuable advice.

Next, seek gifts-in-kind to defray event costs. Because many corporations have in-house printing facilities and professional designers on staff, gifts-in-kind of design and printing of invitations, programs, and other materials are fairly easy to acquire. Also, production of slide shows, videos, or paid advertisements is a possibility.

Other corporate gifts-in-kind can include use of company facilities and equipment and donations of merchandise that can be used at an auction, as favors or perks, or for prizes.

They said yes!

After you celebrate the good news of receiving a "yes" from a corporate sponsor, the next step is to close the deal officially. The event chair should immediately send a formal thank-you letter on behalf of the committee.

Occasionally, your sponsor will present a check for the planning committee to disburse as it sees fit. More likely, however, the company will offer to pay the bills for certain goods and services. Getting the specifics in writing is crucial.

As soon as possible you should meet with the corporation's designated representative to negotiate finances and put agreements in writing. This step can save both you and the corporation from nasty surprises later. Discuss the nature and scope of your plans and, drawing

on the event's per-item cost information, pinpoint the specifics of which items the company will cover. Don't make any assumptions. An offer to cover the cost of food could range from paying for the entree to covering all meal courses, but it might not extend to drinks.

Hold this meeting early in the event planning process before you announce any plans publicly. At this stage, it will be easier to make adjustments to accommodate both sides. While a corporation may agree to pay for particular items, you may never learn how much it has actually budgeted for your event. Don't assume you have carte blanche to purchase only the best. Rather, budget mysteries increase the importance of discussing the specifics of what sponsorship includes and what the limits are and of keeping your new partner well apprised of your plans.

While most corporations will not get intimately involved in the event planning process, do invite a corporate representative to sit on the planning committee. Also, use memos and minutes to keep the company informed.

Recognizing the sponsor

While you should have already planned how to recognize the sponsor with perks, plaques, or whatever, discuss public recognition with the sponsor before you release any publicity. By becoming your sponsor, the corporation entrusts its good image to you. Most corporations are fiercely protective of their name and logo. This is one of the reasons corporations often provide the printed materials and handle publicity for a benefit—so that quality control remains in their hands.

Sponsors' names are usually included on all printed materials for the event, such as press releases, the invitation, the program, advertising, and commemorative items. Clear all uses of the corporate name and logo before proceeding.

At the event, the highest ranking college or university official present should give a brief speech of thanks from the podium. After the event, thank the sponsor again through a special memento presented at a luncheon, tea, or small cocktail party. When the project that was benefited is under way, especially if it is a new building or a renovation, invite the sponsor to see the work in progress. An excellent guide to etiquette for working with sponsors is *Letitia Baldrige's Complete Guide to Executive Manners,* which includes a chapter on corporate relations for nonprofit organizations.

Last, give copies of all pertinent records to the development office so that the corporate sponsor will receive proper gift acknowledgment.

Budget Planning Checklist

When planning a special-events budget, take costs for the following items into account:

1. Facilities
- ☐ rental of meeting or reception room(s):
- ☐ overnight accommodations:
  _____number of rooms _____rate
- ☐ rental of:
  - ☐ chairs
  - ☐ tables
  - ☐ props (specify)
  - ☐ lectern
  - ☐ tent
  - ☐ canopy
  - ☐ lighting
  - ☐ extra help
  - ☐ coat checkroom
  - ☐ special electrical or telephone hookups
  - ☐ set-up charges
  - ☐ clean-up charges

2. Food service
- ☐ Number of people to be served; the cost per person for:
  - ☐ coffee hour
  - ☐ luncheon
  - ☐ dinner
  - ☐ afternoon break
  - ☐ cocktail hour
  - ☐ liquor
  - ☐ wine
  - ☐ other beverages
  - ☐ table linen
  - ☐ rented table service
  - ☐ gratuities
  - ☐ test meal

3. Equipment rental
- ☐ tables
- ☐ canopy or tent
- ☐ chairs
- ☐ flooring or carpeting
- ☐ risers
- ☐ ropes or stanchions
- ☐ props
- ☐ registration desks and stools
- ☐ outdoor toilets
- ☐ booths
- ☐ lighting
- ☐ backdrop
- ☐ trash containers
- ☐ fencing

4. Decorations
- ☐ flowers
- ☐ table decorations
- ☐ extra plants
- ☐ props
- ☐ corsages, boutonnieres
- ☐ candles
- ☐ direction signs
- ☐ other decorations (such as ribbon, balloons)

5. Design and printing
- ☐ fee for design concept and package
- ☐ advance announcements
- ☐ invitations
- ☐ programs
- ☐ promotional flyers
- ☐ posters
- ☐ tickets
- ☐ maps
- ☐ placecards
- ☐ signs
- ☐ registration packets
- ☐ name tags and holders
- ☐ any other printed materials

6. Postage and shipping
- ☐ postage for invitations and reply cards
- ☐ bulk mailing of promotional materials
- ☐ mailing house charges
- ☐ shipping

(continued)

7. Recognition items
- ☐ awards, plaques, trophies
- ☐ engraving
- ☐ calligraphy
- ☐ framing
- ☐ shipping and handling

8. Miscellaneous
- ☐ VIP travel and expenses
- ☐ honoraria
- ☐ gifts
- ☐ mementos
- ☐ extra help
- ☐ security
- ☐ insurance
- ☐ first-aid station
- ☐ taping and transcribing proceedings
- ☐ visitors' center materials and staff
- ☐ electrical connections
- ☐ water hookups

9. Transportation
- ☐ buses
- ☐ vans
- ☐ parking
- ☐ valets

10. Entertainment
- ☐ fees
- ☐ additional equipment
- ☐ promoter fees

11. Publicity
- ☐ advertising
- ☐ photographer
- ☐ printed photos
- ☐ slides
- ☐ duplicating
- ☐ mailing
- ☐ entertaining/hospitality for the press
- ☐ press room equipment (computer hookups, fax machines)
- ☐ banners

12. Audio-visual equipment
- ☐ slide and film projectors
- ☐ screens
- ☐ extension cords
- ☐ projector carts
- ☐ microphones
- ☐ mixers
- ☐ speaker system
- ☐ tape recorders
- ☐ television monitors
- ☐ VCRs
- ☐ overhead projectors
- ☐ pointers
- ☐ flip charts
- ☐ blackboards
- ☐ technician and operator services

13. Office expenses
- ☐ staff time
- ☐ overtime and compensatory time
- ☐ additional staff (temporaries, students)
- ☐ data processing
- ☐ phones
- ☐ duplicating
- ☐ postage for general correspondence
- ☐ supplies (pens, pads, decals, folders)
- ☐ committee materials
- ☐ hospitality for committee members
- ☐ complimentary tickets
- ☐ staff accommodations
- ☐ staff travel and expenses

☐☐☐☐☐

Chapter 4

Volunteers

The role of volunteers in fund-raising events varies tremendously from institution to institution. Some institutions utilize them for every event, while others rarely involve them. Some colleges have standing committees, while others form committees as needed. At every institution, there are times when involving volunteers is good public relations and essential in order to accomplish all that needs to be done. Such occasions include an anniversary, a capital campaign, or a once-a-year gala.

The prospect of working with volunteers makes many special event planners cringe. Volunteers and the committees they form have a way of slowing the planning process, confusing issues and purposes, disregarding budgets, and in general "making work" for planners. The event planner's cry of frustration is, "I could do this so much more easily myself!" However, the fact is that volunteers are an integral component of success.

Large events often utilize several hundred volunteers working in every imaginable capacity from committee chairs to greeters. There is a good reason for this large structure—volunteers are expected to buy tickets, to purchase tables, to bid for auction items, and to recruit others to do the same. The larger and more visible the committee, the quicker new people are to jump on the bandwagon, bringing new money along with them. This is particularly true when committee members are socially prominent VIPs, media or sports celebrities, or corporate CEOs. The volunteer structure and the excitement and visibility it creates become an important part of event publicity and a powerful marketing tool. Volunteers are the recruiters, ambassadors, and sales representatives for the event.

The volunteer structure needed for a large-scale fund-raising event may surpass any with which you have previously worked. But as daunting as a massive volunteer system sounds, large events are impossible to do alone. A well-organized, well-managed system can save you work and preserve your sanity.

Many problems that arise when volunteers are added to the planning mix are not the fault of the volunteers, but result from staff members' lack of skill in working with them. The secret to success lies in good volunteer structure and management.

Volunteers have much to offer

Volunteers are the link between the visions of administration and faculty and the external people who have the wherewithal to make visions realities. Volunteers can give you access to social circles, to the corporate community, to politicians, and to community resources. As outsiders willing to commit time, energy, and money, volunteers add a measure of credibili-

ty to your cause. By sharing in the planning and implementation of your event, volunteers develop a sense of ownership and become committed to its success with a pride and enthusiasm that are contagious.

Volunteers can give you a fresh perspective, new ideas, and insights into the inner workings of your target audience. The secret to success in working with volunteers lies in developing mutual respect and in learning how to channel everyone's energies into reaching goals.

Volunteers have changed

Today's volunteers are much different from the volunteers of years past. Now, planners often find volunteer rosters filled with skilled professionals who are experts in their own fields and can offer experience and knowledge that sometimes exceed the planner's own. Many corporations "loan" their executives to nonprofit organizations for fund-raising events as part of good corporate citizenship. This is particularly common when corporations have underwritten an event, because it helps ensure sponsor input as well as an element of quality control.

In a university setting, planners can frequently enjoy the volunteer input of retired faculty and staff—a real boon to attracting support because many alumni have deep affection for and loyalty to faculty, and after long careers, faculty and staff know many people.

The changing face of volunteers challenges planners to upgrade their own skills. These range from the productive management of meetings to the honing of the diplomatic tact necessary when dealing with people who are themselves used to being in charge.

At a recent conference of alumni and development professionals, participants produced a list of 35 reasons people volunteer their free time. Among the reasons were:

- belief in the organization;
- desire to help the institution achieve its goals;
- a way to meet new people and get involved with the community;
- career advancement;
- a creative outlet for talents and skills;
- desire for self-fulfillment by helping others;
- desire to be recognized as an active community leader;
- desire to be recognized for a job well done; and
- because a friend asked them to get involved.

These are many of the same reasons that donors contribute dollars and that staff members choose to hold their positions. In other words, volunteers and staff members share similar beliefs and motivations for wanting events to be successful. Why then do dissatisfaction and frustration frequently enter the picture for both parties? And how can you prevent it from happening on your campus?

Communicate goals clearly

A major source of problems between staff members and volunteers can be a lack of communication of goals. As a full-time staff member immersed in day-to-day operations, you may sometimes forget that not everyone knows the same range of details about the institution that you do. Volunteers may envision your institution the way it was in their student days 20 years earlier. They may be unaware of the budget cutbacks that you take for granted as a fact of daily

life; they may know nothing of important changes in administrative structure and leadership.

Long before any volunteers are recruited, goals and objectives for fund-raising events should be set by the administration and the appropriate boards. The time to do this is at the outset of each academic year and at the beginning of major fund drives or capital campaigns. Once these goals are endorsed and presented to the staff, it becomes the staff responsibility to relay them to volunteers.

Who's in charge?

It is important for key volunteers and staff members to understand the lines of authority and responsibility. Before committees are fleshed out, key volunteers and staff liaisons should meet with top administrators to reach an understanding and to hear goals articulated and boundaries drawn.

During the event planning process, one person should be in charge of making final decisions regarding expenditures and approval of committee ideas. Especially when events involve hundreds of people and many thousands of dollars, it is imperative that boss, staff member, and volunteer leaders be clear on who reports to whom, who mediates disputes, and who casts the decision-making vote.

Recruit doers

Because the main goal of fund-raising events is to make money, recruit those volunteers who will make contributions and lead you to new donors with the least amount of time and money invested in education and cultivation. In other words, when recruiting, tap directly into your target audience because these people are already interested in the area to be funded and probably have a network of friends who share their views.

The success of the event will be in direct proportion to the quality and commitment of the people recruited to serve as volunteers. Solid volunteer and committee structure become paramount when selling tickets, securing underwriting, finding unique auction items, and negotiating for services at bargain prices mean the difference between a successful fund-raising event and one that barely breaks even.

Top volunteers should be people of action who can be relied upon to follow through on commitments. Committee chairs should be prominent members of your target audience who can talk to other influential people on a peer level.

Look for volunteers who have the personality and social standing to persuade others to support you and to attract members of your target audience, and who have the charm and grace to make everyone feel welcome and needed.

One frequently overlooked resource is people who are members of friends groups because they have contributed to a particular cause. Friends groups are commonly found for art, music, the library, and athletics, although many institutions have friends groups for such diverse areas as journalism and hotel and restaurant management. Unfortunately, even though these individuals have made the most tangible demonstration of interest, they are frequently the last ones called upon to help plan and promote events.

Another good hunting ground is the roster of persons who register for continuing education courses. This is a particularly good way to identify community members who may

not have any other affiliation with your institution, but who may have interest in specific areas. One smart director of a school of art discovered the name of the wife of a prominent local banker on the roster of a continuing education art course. He asked her to serve as a volunteer for his newly formed friends group. Even though the woman had had little contact with the university, she quickly became an exemplary volunteer and a major donor, drew her husband's influential friends and business contacts into involvement, and ultimately created an endowment that helped build a new wing on the art building.

Your alumni association is an excellent source of volunteers. Alumni staff members have vast networks of alumni acquaintances and can provide background information about an individual's areas of expertise, interest, previous volunteer experiences, and giving potential. This is a particularly good resource when you are planning an event that will take place in another city or during a capital campaign when events may be staged in many different locales. Don't overlook existing alumni chapters as a ready source of reliable, motivated volunteers.

Make the adage, "If you want something done, ask a busy person to do it," work for you. Read local and regional society pages to learn who volunteers for what causes and which corporations get involved. These people and corporations may be willing to help your cause too. Scan the published lists of patrons of benefits put on by other organizations to help match names you recognize and their interests with your volunteer needs.

Once you have recruited the top volunteer leadership, ask each person to recruit his or her own subcommittee members and volunteer workers. In this way, you can take advantage of the power of friend asking friend, which will encourage a degree of commitment and camaraderie. A word of caution, however: Active, vibrant volunteer structures must have a constant influx of new, enthusiastic people. While relying on top volunteers to recruit their own friends is a bonus, guard against the idea that your volunteer network is a clique that not everyone can join. Communicate this philosophy to volunteer leaders and get them committed to encouraging a continual infusion of "new blood."

Reach out to volunteer prospects by inviting them to an open house to explain your purposes and to ask them to join a committee. Publicize organizational and recruiting meetings through the local press, campus newspaper, and alumni publication, utilizing free space such as "community calendar" columns as much as possible. During your main recruiting push, buy advertising space in publications that are most likely to be read by your potential volunteers. If you have a yard sign at your building or a bulletin board in a well-traveled area, post meeting particulars and stress that everyone is welcome.

When you need a large number of volunteers quickly, plan a volunteer recruitment party and have each volunteer bring a new person. Try a friendly competition and reward volunteers for recruiting new people through incentives such as free tickets to campus plays or shows, university souvenir items, or passes to athletic events. Recognize all volunteers for their efforts. A small, inexpensive gift such as a leather bookmark embossed in gold with the university seal is always a good motivator.

Utilize the talents of veteran volunteers, and give them a meaningful role in recruiting by asking them to identify what types of people and what types of skills are needed to flesh out volunteer ranks. Next, have veterans lead recruitment meetings and work as hosts and hostesses to make newcomers feel welcome and to answer questions. Ask new volunteers to complete an information sheet that includes name, address, phone numbers, employer, and areas of interests or special skills like calligraphy. Collect the sheets at the end of the meeting because many people will listen to the entire program before deciding whether to sign on. Distribute a brief fact sheet about your volunteer program, and include the name and phone number of a staff person who can answer questions and provide more information.

Form committees

Well-organized, properly managed committees are the most efficient, creative way to bring fund-raising events to successful reality. A committee that has a variety of members with different skills, backgrounds, and points of view ensures the greatest flow of creative ideas and spreads the burden of work among many.

Committees can also save you time because details can be worked out in meetings instead of tying up your time or that of the entire group of volunteers or of the executive committee. However many committees are involved, try to match the interests and abilities of the committee chair and the members with the tasks to be completed. Then step back and let the committees run their own affairs, generating ideas and making decisions without your constant input and supervision.

Sometimes it makes sense to use only one committee, while at other times you'll need a complex committee structure. When deciding which arrangement best fills your needs, focus on your goals in public relations and fund raising, and remember that volunteers should be used for their talents and abilities to advance your cause, not as a source of free labor.

Here are several typical volunteer structures:

• **A standing committee:** An easy, efficient way to organize volunteers for an academic year, a celebration year such as an anniversary, or a fund drive or capital campaign is to form a central events planning committee. This becomes the group from which all planning originates and from which all other committees derive. The committee works with college staff to coordinate all events, both friend-raising and fund-raising, for a given span of time.

When forming the committee, select people for their leadership, experience, willingness to work hard, ability to attract support, and skills in motivating others. Members should be donors and have the financial means to support fund-raising events. Establish officers within the committee and move people through the chairs on an annual basis. This guarantees continuity and gives you a method to gracefully phase out old volunteers and bring new ones on board.

Customize your overall committee structure from this point to suit your needs by assigning people to chair specific events and by adding subcommittees.

• **A volunteer is in charge:** Traditionally, a fund-raising event in the nonprofit sector, such as an annual gala, is chaired by a top volunteer. He or she forms an executive committee responsible for shaping the event by making major decisions about its scope and tone, as well as ensuring that it achieves its fund-raising goals. A college or university staff member serves as liaison to this committee. The executive committee can generate numerous subcommittees responsible for attending to details such as decorations, invitations, ticket sales, food, and entertainment. Members of the executive committee chair the subcommittees. Thus the volunteer structure forms a pyramid that continues to grow broader at the base as new volunteers are recruited throughout the planning stages.

Before this army of volunteers begins its work, the college or university executive and the event chair agree on goals for the event, both in public relations and in dollars to be raised. They establish the general framework and a chain of command. The executive committee takes over and proceeds with minimal staff input.

While this system leaves staff members free to attend to other duties instead of spending countless hours in committee meetings, such an autonomous committee may not always make the decisions you want, and countermanding their decisions can be very sticky. This struc-

ture is useful, however, when you are working with a small professional staff with many other duties or when there are many events on the schedule, such as during a celebration year or capital campaign. For success, a carefully trained, reliable group of volunteers who can be counted upon implicitly is essential. A bonus of this arrangement is that volunteers are free to brainstorm and implement their own ideas—something that most people thrive on.

If you choose this structure, you will need to establish reporting and coordinating mechanisms between yourself, the committee, and the development office. This coordination will help your volunteers avoid stepping on toes and approaching prospects who may be already targeted for other projects, and will also ensure that proper gift acknowledgment procedures are followed.

- **You are the event chair:** Many colleges and universities want a professional staff member to chair the standing events committee or the executive committee for a specific event. This person could be a development or alumni office staff member or the special events planner, who in turn coordinates decisions with the development office and the representatives of whatever project or department will be benefited.

The staff member then forms an executive committee of top volunteers, each of whom chairs a subcommittee and becomes responsible for recruiting his or her workers. A variation of this plan occurs when a professional staff member is assigned to manage the committee as a co-chair with a volunteer. When the staff member chairs a specific event committee, he or she assumes the responsibilities of the volunteer chair described above.

Assigning committee control to a staff member means that more decision-making authority remains in-house. Also, the staff member becomes a clearinghouse and the common link who increases efficiency and helps to guarantee consistency for all of the year's events. When a staff member chairs a standing events committee, less time is wasted in "reinventing the wheel" for each event, and some resources can be allocated more efficiently. For example, a staff member can negotiate a better price for food by offering the caterer several jobs instead of one. It is also easier to track donor records and to avoid asking the same people repeatedly to make donations or to purchase tickets. It is easier to establish solid relationships with suppliers.

Unless the staff member is a skillful manager, however, volunteers may feel that this arrangement decreases their opportunities for creative input. They are likely to feel less committed to getting tasks completed and attending committee meetings because they know that responsibility ultimately rests with the paid staff member. Also, unless a staff member has been released even temporarily from other duties, he or she may find it almost impossible to oversee a large event or several events.

Train and motivate volunteers

Recruiting good volunteers is only the beginning. Once you have signed up the volunteers, you need to involve them in a productive, meaningful way that is satisfying to them and beneficial to you.

First, be certain that everyone who volunteers is contacted immediately. Even if the planning for the event will not begin for months, you should send each person a note thanking them for volunteering and giving them an idea of what will happen next and when. It is discouraging when a person volunteers but doesn't hear a word for months or is never called on at all. Neglect opens the door for people to grumble to their associates about you and your lack of organization.

As you organize the executive committee and subcommittee structures, carefully match

volunteer interest and skills with the jobs to be done. Strive to make the most of your volunteers' time by assigning them to tasks they can do and enjoy doing. Every volunteer knows that sooner or later there will be unglamorous jobs like stuffing envelopes, but they will do these more cheerfully if the "meat" of their position is meaningful.

All volunteers deserve the same respect you'd give a paid worker, including the right to know what you expect of them and when. Prospective executive committee members should see a written job description before they accept the position. This step protects them as well as you. A job description formalizes the activity, communicates the seriousness of the responsibility, and helps the person make an honest assessment of the time commitment. This is also the time to let executive committee members and the event chair know that they will be expected to purchase tickets to the event, preferably at the highest level.

The reasons for this are twofold. First, the event budget cannot accommodate more than a few complimentary tickets and still reach the fund-raising goals. Second, top volunteers are usually people of means who have friends in influential positions. By purchasing patron-level tickets or buying an entire table at a gala, the volunteer sets the pace for his or her friends and associates and is in a stronger position to ask them to participate at the same level.

If, after reviewing the job description, a person decides that a position is more than he or she can manage, it's better to learn this before planning begins than to have catastrophe strike later. Job descriptions for subcommittee members can be given verbally in a training session by the subcommittee chair or the executive committee member in charge of the particular event.

When organizing fund-raising event volunteers, inform them that volunteers will not receive complimentary tickets. Clearly communicate that this is because the purpose of the project is to raise money for the cause, not just to have an event. If all your volunteers attended the event for free, you would probably not meet the fund-raising goal.

At training sessions for all volunteers, explain the project and its goals and objectives in the same manner that you used to train executive committee members. Include features to bring the project to life such as tours, talks from key people, or sneak previews of construction blueprints. Strive to create a link between volunteers and the project in order to build their understanding and support.

As the planning process moves from the idea phase to the implementation phase, you may need to hold another training session.

Establish a mentoring system that pairs new volunteers with veterans during initial phases of event planning and during ticket sales. This makes veterans feel needed and gives newcomers more confidence, helps ensure quality control, and saves you from answering the same questions over and over.

Make meetings count

Effective committee meetings begin on time, end on time, and don't waste time in the middle. Every meeting should have a clear purpose that can be stated in a few sentences and a written agenda that is distributed to every member beforehand.

Meetings should be confined to one hour—less whenever possible. Efficiency and time limits are imperative; most volunteers have busy schedules and cannot spend hours in marathon discussions that produce little. Committee chairs should be well-versed in meeting management and know how to limit circuitous discussion and keep the meeting on track. Keep minutes for each meeting and distribute them to committee members to prevent con-

fusion about what decisions were reached and who is responsible for what. Before each meeting ends, the chair should make clear assignments and note them in the minutes.

One way to keep committee meetings to a reasonable length and to help guarantee attendance is to hold them at lunchtime in a convenient location. Invite members to bring a brown-bag lunch or order sandwiches, but don't go to a restaurant; it's hard to accomplish anything in this setting. If you are working with a loaned executive, try meeting at that person's office or hold the meeting right after work in a location that most members can get to easily on the way home. This prevents people from going home and getting too relaxed or too involved in other things to leave the house again. And committee members with small children won't need to find a babysitter for the evening.

The two greatest detriments to successful committee work are rambling sessions that seem to last forever without producing significant decisions, and meetings that seem to exist only for the sake of meeting. Committee members are sending clues that meetings are nonproductive when they leave early or don't show up at all. If you keep the meetings short and to the point, with an action agenda and clear assignments, members will attend because they know their time will be spent productively.

Give volunteers room to work

Volunteers need a dedicated work space where they can spread out projects on worktables, maintain files, use the telephone, and close the door when they need privacy. Resist the temptation to furnish the volunteer office with rejected furniture and a half-functioning typewriter. Instead, make the dollar commitment to provide a modest but up-to-date work environment stocked with basic office supplies and equipment that works. Especially helpful tools are a computer and a printer. Add a large bulletin board or a write-on, wipe-off wall calendar to post notices about upcoming committee meetings, important dates, and assignments.

Keep a computer file or a reference notebook of all volunteers, whether currently active or not, with name, address, telephone numbers, and pertinent information about skills and interests for everyone who has offered to help.

Minimize requests to office staff by training volunteers in office basics such as where to find supplies, how to run the photocopier, how to fill out standard forms, how to place long-distance telephone calls, how to schedule the conference room, and how to operate the office coffee maker.

Conversely, inform the office staff about the important role volunteers play in your success and tell them about the privileges volunteers have been given regarding use of office equipment and supplies. Teach staff how to work diplomatically with volunteers and where to turn in the event of a conflict.

Whenever possible, designate one clerical staff member to work regularly with volunteers. On large projects such as a capital campaign that may entail planning many events, sending hundreds of invitations, processing checks, and keeping accurate records, hire temporary secretarial support for the volunteer office.

By dedicating a professional work space for volunteers, you convey the message that you respect them, that their projects are serious business, and that their work is important. In return, a well-organized work space will greatly increase volunteer efficiency and output. After all, volunteers are there to help you get the work done, not to create more work for you and other staff members.

Staff and volunteer relations

Sometimes, staff may show turf-guarding behavior and feelings of resentment toward volunteers. This may be particularly true for those staff members who are not part of the decision-making process. Resentment can build when staff members feel that volunteers can do anything they want and that all volunteer ideas are accepted and acted upon regardless of previous office policies, and when staff people feel a threat to their own job security.

On the other hand, volunteers often feel like "second-class citizens" who have not been told everything they need to know to get the job done, and who walk the uncomfortable line between needing to be in an office regularly, but not being on the "real" staff.

Friction between staff and volunteers can build quickly if staff feel that volunteers get all of the "fun" assignments. When the excitement, glamour, and frenetic pace of fund-raising events begin to emanate from the volunteer office while the routine of regular duties continues for everyone else, tempers can flair and cooperation crunch to a halt. Feelings are manifested through seemingly trivial complaints; staff grumble that volunteers are too noisy, and volunteers complain that they can't get a turn to use the photocopier.

An ounce of prevention...

It's easier to prevent this situation from developing than to resolve problems when they happen. Start out by clearly delineating the roles of staff and volunteers and assuring each group of their importance to the long-term success of the institution.

Forge a bond between the two groups by focusing on goals to be achieved and the need to pull together as a team. Personalize the relationship by helping people get to know one another as co-workers. An easy way to do this is by inviting volunteers to join staff over pizza at lunchtime, by introducing volunteers so that people know one another by name, and by treating each group with an equal standard of professional respect. The beginning of the academic year or the beginning of a major fund drive or capital campaign should always include a time for volunteers to gather and get acquainted with each other and with the staff.

Recognition and rewards

Volunteers thrive on frequent recognition and rewards. There is no more effective way to keep volunteers happy and productive than through positive feedback. Many people wait until an event is completed or a committee's term is fulfilled to give recognition.

Instead, keep motivation high by giving recogniton often in the form of praise to the group and by telling individual volunteers how much you appreciate their efforts.

At the event, display the names of all volunteers on an attractive poster and print them in the program.

When the event is over, present everyone who helped with a small token reminiscent of the event or a souvenir item from your college or university. Give executive committee members a more substantial gift and present something extra-special to the event chair. If your budget permits, host a recognition tea with volunteers, college or university officials, and the recipients of the event proceeds.

Chapter 5

"Tickets, Please"

Whether you are holding a testimonial dinner or a world-premiere opera, meeting your fund-raising goal depends upon selling all the tickets. At this point, the event planner becomes a combination conductor and cheerleader responsible for orchestrating an orderly, efficient ticket sale and being the event's number one booster. If you are fortunate enough to work with a dedicated volunteer committee, the volunteer chair and/or the committee member responsible for ticket sales will carry much of the workload, but your involvement is essential, especially at the ticket sales planning stage.

How much should you charge?

Step one is to determine how much the tickets will cost. Tickets for fund-raising events rarely come in one denomination, but are often priced at several levels, each featuring various perquisites and recognitions designed to induce people to pay a premium. You can create ticket levels for any event, whether it is a sporting event, a gallery opening, a celebrity concert, a world premiere of a movie, or a gala dinner and dance. Ticket leveling helps ensure budget stability and adds an air of prestige that appeals to many donors and thus increases income.

How many ticket levels you will offer, how much they will cost, and what perks you will include depend on what makes sense for your project. Consider the affluence of your potential audience and the nature of your event. The more exclusive the event, the more you can charge for your tickets.

How many levels?

Offering three levels of ticket prices is usually manageable, but having many more becomes unwieldy. The base or "general admission" ticket should be just that—it is the lowest in price, and it covers expenses and includes at least a 50 percent markup as a donation. If the event costs are very low and it won't price you out of the market, push this markup to 65 percent. Generally speaking, half of all ticket sales will come from this level.

Next, offer a mid-level ticket. This covers expenses and represents a larger donation. In return, the purchaser receives perks such as better seats, preferred parking, and mention in the program.

Finally, offer a high-priced "patron-level" ticket. Sales from this level will represent a small number of your greatest supporters, led by the event chair (you hope) and persons who are

already major donors to the area that will be benefited. Corporations may also contribute at this level. All patron-level donors receive VIP treatment and extra perks as well as plenty of public recognition. Patron tickets should include a significant donation.

Perks make it work

Perks can include things like printing patrons' names in the program or offering them reserved parking or preferred seating. At the highest ticket levels, perks should include all of the things given to lower-level patrons, plus goodies like a backstage party to meet the entertainers, a private reception with dignitaries, or an autographed copy of a visiting author's book, as well as public recognition in all event-related printed materials. When adding perks to higher ticket levels, choose those that increase your costs only slightly or not at all.

How much is deductible?

In the view of the Internal Revenue Service, only the price paid above the event's per-person cost for goods is tax deductible. If you are sponsoring a golf outing at which guests receive lunch, a sleeve of golf balls, a windbreaker, and 18 holes of play, the guest can only declare as a gift the amount spent above your per-person cost for this package. Since your cost may be lower than the retail value of the items when priced individually (especially if some items were donated as gifts-in-kind), calculate your per-person cost and note it on donor receipts. It is the donor's responsibility to make the appropriate declarations at tax time.

If you are in doubt as to what is deductible and what is not, consult your institutional attorney, a development officer, or an accounting firm, or call your area IRS office.

Selling tables

Another income-boosting technique is to sell tables. In this strategy, individuals or corporations purchase all the seats at a table. In exchange, they receive a good location in the room, perks, and recognition in the program. An attractive sign with the sponsor's name is displayed on the table.

The purchaser invites guests to sit at the table, and these are usually corporate executives and their guests. Occasionally a corporation will sponsor a table as a donation and will not send representatives or invite guests. To prevent having any empty tables at your event, when you sell a table, ask for the names of the guests. If seats are unfilled, get permission to resell the tickets to someone else or to fill the seats with VIPs, special guests, or members of the media. Since these seats are already paid for, they provide a no-cost way to accommodate complimentary guests, but always get the permission of the sponsor before you assign individuals to a corporate or sponsor table.

Selling the tickets: Start at the top

Every fund raiser knows that people who are donors to a cause exhibit more commitment to it and find it easier to ask others to become donors as well. Therefore, begin the ticket sale by asking each committee member to purchase tickets. If you laid the appropriate groundwork when you recruited volunteers, this should not come as a shock. In the best of all situations, the event chair will kick off the sale with the purchase of patron-level tickets. Ticket sellers will find it much easier to convince friends to join the fun when they themselves have already bought tickets.

Next, using face-to-face meetings, sell the sponsor or patron-level tickets and the sponsor tables. Complete this part of the sale before you announce the event publicly or print the invitations so that you can list the sponsors on the invitation. Listing prestigious individuals and corporations as sponsors not only provides recognition but also helps promote the event by adding status and credibility and thus enhancing its desirability.

As you make the sales calls, show potential buyers a list of those who have already purchased. The business world is a highly competitive one, and corporations may be encouraged to purchase tickets at the sponsor level just because others have already done so. You need to make the rounds of all prospects at this level early; once the invitations are printed or the publicity is released, the opportunity for advertising benefits to the purchaser is lost and so is the incentive to buy.

The kickoff or preview party

A kickoff or preview party is a powerful marketing tool. A kickoff party, held no later than two months before invitations are to be mailed, gathers top prospects together with the event chair and committee leaders to promote the event and to sell corporate sponsorships, tables, and patron-level tickets. Invite only people who are capable of purchasing at these levels or who are members of the media, such as society editors or gossip columnists.

The preview party should not be extravagant, but it should incorporate the theme of the event. Plan a short after-work wine and soda bar or a tea in an easily accessible location. Consider using a location related to your event—for example, the vacant lot where the building for which you are raising money will be constructed, or the classrooms that your event will fund for refurbishing. Hold costs down by keeping refreshments and decorations to a minimum and limiting the party's length.

During the party, the event chair or a university official should present brief remarks about the event and its purpose, recognize corporate sponsors and patrons to date, and "rev up" people to buy tickets and to spread the word to their friends and business associates. If possible, provide a sample of the event's entertainment or main feature. For example, if you are selling tickets to an opera, you might show a video clip of the performance in another city; if you are hiring a big-name entertainer, you might use a message from this performer taped just for your audience.

Invite prospects to the preview party with a short letter that states your purpose and presents the kickoff as an opportunity to take a leadership role in an event that promises to be a big success. Use the occasion to build interest and excitement by revealing a few tantalizing details of the event. With a bit of luck, the society editors and gossip columnists will seize on these to announce your plans and give the names of your committee chairs and sponsors in upcoming columns.

Plan to take ticket orders at the kickoff party, and list in a prominent place those already committed corporate sponsors and patron-level purchasers. If your event is a concert or theater production, you should display a blown-up auditorium floor plan so that ticket purchasers can select their seats.

You should have a method of keeping track of who attends the preview, such as registering guests as they arrive, so that you can call on those who do not purchase tickets during the party. Following up the party with personal calls should sell out the sponsor and patron-level tickets and position you to begin general ticket sales.

Selling out

As the work of fleshing out the details of event arrangements continues in the background, keep your attention, and that of your event chair, focused on selling all the tickets. Use the exhilaration of selling out sponsorships and patron tickets to motivate the people who will implement the general sales portion of your campaign. (See Chapter 6 for tips on building interest in the event and promoting ticket sales.)

First, set up a schedule of how many tickets from each category need to be sold and by what date. This helps keep the sales on track and allows you to see if sales are ahead of or behind projections. When volunteers are selling tickets, setting manageable weekly goals gives them a sense of progress and prevents them from feeling overwhelmed.

Whether you are promoting a dinner and dance for 500 people or a concert for 30,000 people, you can reap sales from special mailings made shortly before the event is announced publicly. Build these special mailing lists from several sources.

If you are promoting a first-time event, turn to people who are members of college or university friends groups who might be interested in the event because of its theme or content. Working with the development office, cull names from lists of people who are members of your institution's major donor group. Double-check all lists to avoid duplicating solicitations, particularly of people who were invited to the event preview party or who are already sponsors or patrons.

If you've held the same event in the past, people who participated previously will be good prospects. If you've kept accurate records, you'll be able to tell who bought tickets last year and at what level.

Finally, brainstorm a list of local dignitaries, out-of-towners who might not otherwise learn of the event, and any other people whose status or reputation merits special consideration. Using a "preferred customer" approach, send these groups a letter a month before invitations are mailed or tickets go on sale to the general public. Offer them the opportunity to purchase tickets before the event is announced, and stress the benefits that accompany the higher-priced ticket levels and the availability of good seats. Include an "offer expires" deadline on the letter to protect yourself from procrastinators who might request four front-row seats the week of the concert when tickets have been sold out for a month.

Unleashing volunteers

Next, unleash your volunteers to generate sales through their peers and friends. One criterion you used in selecting volunteers was their influence on your target audience. Make the

most of it by implementing an effective volunteer sales plan that relies on the personal touch.

If you are sending invitations, peruse the list with committee members and have them identify their friends and acquaintances. Ask committee members to jot a personal note on their friends' invitations. As the reply deadline nears, especially if reservations are coming in slowly, the committee members can follow up with phone calls.

Work with a master list to avoid duplication. You can use index cards for this. Prepare a card for each prospect, and note the name of the committee member assigned to that person. Note on the card the level of ticket purchased, when payment was received, and when tickets were mailed. Save the cards from year to year, but remember to keep the addresses up-to-date.

Another successful selling technique is to assign each committee member to be a table host or hostess. He or she buys a ticket and is responsible for selling all the rest of the tickets at the table. This works best if you have a large committee. The ticket sales chair follows up to make sure that hosts and hostesses are not procrastinating and to lend assistance to those who have difficulty identifying prospects.

Keep motivation high by making ticket selling fun. Sometimes even the most willing volunteer may find it hard to gather the gumption to ask others to buy tickets. Build confidence by training volunteers in what to say and arming them with a thorough understanding of the event and its purpose. If your volunteer force includes many first-timers, team them with veterans until they are comfortable on their own. Build camaraderie and create an enjoyable and motivating challenge by having regular sales reporting meetings. Award prizes for achievements such as being the highest seller, the first to sell out his or her allotment, or the one who brings in the most new donors.

One athletic fund raiser uses volunteer teams who compete on a friendly basis throughout the sales drive. He gives donated prizes weekly to teams and individuals, and the teams receive points on the basis of performance. At the end of the drive, the team with the most points wins a nice prize, and individual best performances are also rewarded. Volunteers have a great time, and because the work is spread among many, tickets sales go very quickly with minimal wear and tear for everyone.

At each reporting meeting, the event chair and the ticket chair should give reports, offer pep talks to get the next week's sales off to a good start, answer questions, and address any problems ticket sellers are having.

The ticket chair should also use weekly meetings to collect written records of who has been contacted. This helps ensure that no prospects are overlooked and also provides a litmus test of ticket sales progress.

Selling out a large event

Fund-raising special events such as concerts, professional entertainments, and productions that rely on large-scale ticket sales to the general public must be supported by lots of publicity, and sometimes paid advertising, to get the message across. (See Chapter 6 for more about this.) If the event will take place on your campus, you may be able to manage ticket sales yourself. It is also still possible to bring the force of the college's or university's friends to bear to get ticket sales off to a solid start.

One alumni director holds a big-name show every year as a fund-raising event for the university's parents club. On the night of the performance, he begins selling the next year's show by announcing the date. Nine months in advance, he offers tickets for the best seats to major

donors, followed by offers to corporations to purchase blocks of seats for corporate entertaining. Next, he invites faculty and staff and then all parents of current students. Then, with a significant portion of the auditorium and of the highest priced tickets already sold, the concert is publicly announced and sales are opened to freshman students and their parents and finally to the general public. Bolstered by a modest amount of advertising and by ticket sales booths in high-traffic areas on campus such as the stadium on football Saturdays, the parents day show is always a sell-out and has raised a significant amount of money in its 15-year history.

Most large facilities—stadiums, convocation centers, large arenas—that routinely sell tickets for events have policies about how tickets will be sold. You will be required under contract to use the facility's ticket outlet system and staff to manage your ticket sales. While you still have to promote the event, there are many advantages in having the facility ticket staff handle orders, not the least of which is their experience. Also, they can make ticket buying more convenient with regular office hours, phone-in ordering systems for credit card holders, satellite purchase locations, and systems to handle mail orders.

Negotiate details before you sign a contract, particularly if you are planning ticket levels and a preview party.

"Show only" tickets

Sometimes despite your best efforts and those of your volunteers, your expensive dinner and entertainment event may not sell out, especially if you've rented a large facility. In an effort to fill the auditorium and retrieve entertainment costs, some organizations sell last-minute, discounted "show only" seats. You can use this technique to attract younger people who are good prospects but cannot yet afford expensive benefit tickets and evening clothes.

Show only tickets are usually for poorer seats, such as those in the top balcony, and admit the purchaser to the auditorium only, not to the dinner or social event preceding the entertainment. Never put show only seats among expensive seats purchased by higher-level patrons. While show only tickets can help fill the house, weigh the risks before deciding to sell them. You may find that the income generated would not merit the additional work and expenses involved in promoting and selling them.

Complimentary tickets

Keep complimentary tickets to a minimum: Every ticket given away is money lost from the fund-raising goal. But "comps" can be a good cultivation tool, and the $100 ticket you give away today may bring you thousands of dollars tomorrow. In a collegiate setting, certain people who are essential to your success, such as the president, are always comped. Some institutions have unwritten policies that members of the board of trustees are comped no matter what. The secret of success with comps is to be as stingy and as selective as possible.

Decide during budget planning how many complimentary tickets you will need, and include this cost on the expense side of the budget. Amortize it among all tickets so that the expense is retrieved. Avoid complimentary ticket request problems by deciding early on who gets comps and how many they get. Put the policy in writing. Don't comp committee members or too many staff members.

Another way to cover comp costs is by planning to fill seats from paid-for but unused spon-

sor tickets or tickets purchased as a donation by people who cannot attend. As a general rule, 15 percent of the people who buy tickets will not attend because of unforeseen circumstances such as business trips, illness, or schedule conflicts. But this percentage can fluctuate greatly and make it difficult to plan. If you know how your alumni and friends generally respond and take into account the type and timing of the event, you should have some idea as to how many vacant seats you may have. If you are sponsoring *the* event of the season, your "no-show" percentage may be much lower.

A big budget drain is the custom of providing complimentary tickets to a plethora of administrators, faculty members, and other people who have no real roles in assuring the success of the event. This can become a double-edged sword. While event planners are dismayed at having to provide so many comps, faculty and administrators dread having to attend another event. Planners are fearful of reducing the comp list, while many on the list would be secretly happy to have a night off. The solution is to know the "must invite" list of people on your campus and cut the rest off unless they are working on the event's behalf (such as hosting a table of VIPs).

Among the cast of thousands who are routinely comped, there are many folks who would gladly pay for tickets because they know the money goes to a good cause. If you think this is the case, just ask. Occasionally, dais participants will insist upon purchasing their tickets. If such good fortune is yours, accept it graciously and recognize the person's generosity with a remark as he or she is introduced to the audience.

Hiring an events consultant

Special events consultants and special events management companies are available for hire in most major cities. These consultants are often people who have been successful event planners in higher education or for other nonprofit groups and have subsequently moved into the consulting world.

Events consultants can provide many services from assessing the feasibility of a major event to coordinating the entire process from planning to follow-up. Consultants are expert at negotiating the best prices for services such as catering, printing, and entertainment because they have established relationships with providers. Professional consultants can save you time and money because they know by experience what works and what doesn't. If active in the early planning phases of events, they can serve as a neutral voice of authority in smoothing bickering and quashing over-ambitious or unrealistic ideas. And consultants can give the event their full attention instead of trying to squeeze event planning into many other job responsibilities as staff members must often do.

Events consultants are particularly useful to institutions that have a small staff, a weak volunteer structure, or an inadequate prospect mailing list. Consultants can help in all three areas because they have the time to devote to the job and the know-how to solve these problems.

Colleges and universities don't often use the services of events consultants because they already have skilled event professionals and fund raisers on staff. But there are times when hiring a consultant can greatly relieve the burden on your staff—during the hectic pace of a capital campaign, for example, or an event-filled anniversary year. Retaining a consultant for a specified time, such as the duration of a capital campaign, frees regular staff to concentrate on other duties, enables one person to ensure continuity and quality in the various events, and eliminates the need to hire a permanent staff member who may not have a job after the campaign ends.

When shopping for a consultant, interview several and discuss your overall ideas to get a feel for whether or not the consultant will be compatible. Ask for references and call them. The best way to check out a consultant is to attend an event that he or she is staging.

Conversely, the consultant will want information about your institution and needs. Most consultants have minimum event size requirements in order to justify their fees. If the consultant does not believe that your ideas can be successful, he or she will usually decline the job or suggest alternatives. Most consultants want to begin work before an event concept is cast in stone or planning has begun.

After you have interviewed the consultants, ask for written proposals. These should include a description of services to be provided, a timetable for beginning and ending the association with you, and a flat fee, plus reimbursement for expenses billed at cost, for the entire job. Avoid planners who want to charge on a contingency basis, on commission, or on a percentage of profits basis. Professional fund raisers regard such practices as unethical.

Before you sign a contract, carefully weigh the pros and cons. Commit all agreements to paper. Look hard at the cost of the consultant vs. the cost of staging the event or events on your own. The money paid to the consultant is money taken away from your cause.

Packaged events

A relatively new wrinkle in the fund-raising events business is the packaged event. For a set fee that is usually reasonable, event companies provide a "carry-out event" complete with all of the supplies you need, a publicity kit, and instructions. Some packaged events even include staffing. These events are gaining in popularity as a quick way for organizations to make fast money with minimal effort. In the Southwest, barbecues, shrimp boils, and raffle-type events are becoming popular.

Packaged events can be fun and usually do produce income, but there are some disadvantages. First, they don't communicate anything specific about your institution. They may clutter your fund-raising events schedule and give the appearance that your college or university always has its hand out.

Second, packaged events are not exclusive. That is, the contracts for most of these events stipulate a minimal amount of time before the vendor can sell the same event to someone else in your area, and, in fact, most contracts only guarantee that the vendor won't hold a similar event on the same date any closer than 20 miles. The catfish fry on your campus could be competing with an identical one in the next town.

Packaged events may be appropriate for providing fast cash in emergencies—needing to raise money on short notice to send the pep band to a bowl game, for example—but such events should not become mainstays in your overall events planning.

Chapter 6

Publicity

Publicity helps accomplish the event's public relations goal of building awareness of your institution and its people and programs. Publicity also serves as a way to publicly recognize honored guests and volunteers. When yours is a fund-raising event, publicity helps sell tickets. The more favorable publicity people hear and read about your event, the more desirable it becomes to attend. Ticket sales benefit as people "jump on the bandwagon," and the bandwagon gets rolling through good publicity.

Publicity takes two forms: "Formal" publicity uses the media through standard public relations channels; "informal" publicity uses word-of-mouth and grassroots interest-building techniques to promote the event.

Working with the PR office

As college or university event planners, the majority of us have the luxury of a professional public relations staff on campus. Whether this office is called "media relations," "news service," "communications," or "public affairs," it is the only office authorized to deal with the media on the institution's behalf.

The staff includes public relations professionals who are trained in journalism, know the formats for the different types of media, and have established relationships with reporters. They know what kinds of stories will interest the media in your area, what reporters will and won't use, and how to time news for best coverage.

Although the existence of the public relations staff means that event planners do not have to shoulder the responsibility of working with the media and promoting events alone—a task that is a full-time job in itself—they must be involved in the publicity planning and understand how the media relations function operates. They need to know the basic rules of the publicity game so that their requests will be reasonable and their expectations appropriate.

Here are some tips to help you deal with your PR office:

1. Never contact the media yourself. The college or university needs to "speak with one voice" so that messages are clear and news releases and advisories are professionally written and prepared in the correct format. This is the exclusive domain of the PR office.

2. Involve the public relations staff very early in the planning process. This will give them the opportunity to make suggestions that can maximize publicity. Early involvement provides the chance to identify and release many stories to keep awareness of the event high. A well-planned publicity campaign includes coverages timed to support important points on the road to success—the beginning of the public ticket sales, for example, or the announce-

ment of a big-name entertainer as your headliner.

3. From an editor's point of view, most events are not newsworthy. This is all the more reason you need to work with trained PR professionals who know how to pitch a story and find a news angle that will prove irresistible. Events attract the most media attention after the fact. That won't help you sell tickets, but it will help accomplish PR goals and build attendance in subsequent years.

Formal approaches to publicity

The public relations staff builds a media plan around the event based on the important happenings in the planning timeline. They determine the appropriate media outlets and package the news accordingly. The public relations staff may choose news releases, exclusive interviews, photo sessions, tours, video news releases, sound releases for radio, or a press conference to get the word out. Skillful practitioners can identify specialized outlets for stories that may not be obvious at first. Perhaps the new laser light technology that will be used during the entertainment portion of your event would be of interest to the local science writer, or the food and wine editor may run a story about the award-winning regional wines that will be served at the dinner.

A good media plan contains a mixture of several techniques and outlets, each aimed at the target audience through the medium they utilize most. Sending news releases to the local daily paper with a 350,000 circulation may do nothing for your event, while an article in the alumni magazine will generate a flood of ticket sales.

The public relations staff also takes charge of coordinating the institution's press relations efforts with those of the corporate sponsors of the event. Coordinating planning with the corporate PR office means joint releases can be made, ensures that confidential information is not released, and takes advantage of the corporate clout in getting coverage.

Concentrate on local coverage

Most publicity will be centered on the local media since they reach the people who are most interested in happenings on campus and most likely to attend or to be involved in a volunteer capacity. It is difficult to get national coverage unless the event speaker is a prominent political figure such as the President of the United States or the head of a foreign country.

Look for the local angle in news stories. A news release describing your gala may hit the trash, but when it also announces that the biggest corporation in town is donating $10,000 to sponsor the event, the story becomes newsworthy. Rather than saying that a benefit will be held to help construct a new building on campus, focus on how the building will benefit the community.

Local society editors are an important outlet for events news. They are usually interested in prominent committee members and will sometimes attend the kickoff event and the event itself. Remember to send them invitations, and be prepared to help them find important people in the crowd for interviews, comments, or photos.

Cultivate society writers and editors, and read their columns faithfully to learn what and whom they cover. To encourage coverage, offer society writers exclusive information or an interview with the event's honored guest. If society writers attend the event, seat them with

interesting and important people, but not at the same table with writers from competing newspapers.

The chances for local television coverage increase dramatically when on-air personalities participate in event planning or take part in event activities that are off-beat and highly visual. A Houston charity recently garnered excellent television coverage by inviting local TV personalities to drive go-karts in a fund-raising race. All three major local stations carried the event during their evening newscasts.

If you are sponsoring a large event that is open to the public, inviting a local radio station to broadcast from the event site is powerful publicity for you, and it is good advertising for the station.

Campus media

Student newspapers, faculty and staff periodicals, and campus radio and television stations are important outlets. Develop on-campus interest in a major special event through a series of stories in the campus press. Maintain a constant flow of news, including coverage of your committee's progress and exclusive interviews with event leaders.

Always treat campus media as equals to external media. Invite representatives to all press conferences and briefings, and put them on the mailing list for news releases. Don't be surprised if campus reporting is not always favorable, but resist the temptation to complain to the editor or faculty adviser about negative stories.

Informal approaches to publicity

With the professional media in the capable hands of the public relations staff, you can turn your attention to informal publicity channels. A successful fund raiser says his best technique for promoting events is having friends ask friends to get involved. This is where the strength of your volunteer leadership and the enthusiasm of committee members prove invaluable.

One of the event's standing committees should be public relations or publicity. Its job is to promote the event through dogged hard work, utilizing the personal touch. Members of this committee spend hours on the phone talking up the event, inviting people to attend, selling tickets, helping find sponsors, and asking for favors. These people should have a wide circle of community contacts, especially among members of the target audience. They need to be skillful at securing the cooperation of others, and they should be strongly motivated to get the job done.

Public relations committee activities should be coordinated with the institution's public relations staff to maximize impact and to avoid stepping on toes. The difference is that these committee members work exclusively with the powerful word-of-mouth grassroots networks that exist in every community.

Tapping the network

Gaining grassroots support and tapping into informal information networks can make an event take off. To accomplish this, first get the attention of opinion leaders who can endorse the event with their constituents, and meet with them one-on-one to ask for their support.

Determine how information is channeled through the informal network, and then figure out how to make it work for you. Each group of people has its own network. To gain faculty support, you may need to get the endorsement of the deans; for students, working through the Greek system leaders may be key to success. In town, spread the word through community service organizations, or explain the event plans to business leaders over lunch.

Utilize no-cost ways to display the message, such as placing posters on bulletin boards on campus and around town in restaurants, churches, and other places where people gather. Use free listings in community affairs calendars published by newspapers, announced on local radio, and publicized by chambers of commerce and some churches.

Seek the help of merchants by asking to use their outdoor advertising message signs or their store display windows. Supermarkets will often print messages on their bags, and utilities will allow promotional inserts to be mailed with their bills.

Paid advertising

Most fund-raising event planners agree that paid advertising is one of the least successful ways to build attendance. Avoid using paid ads unless you are promoting a concert or entertainer to the general public and success depends upon selling out a large auditorium or convocation center.

Paid advertising is expensive, and you will be wasting your money if your ads don't reach your target audience. If you don't know how to buy ads, consult an advertising faculty member on campus or recruit an advertising professional to serve as a volunteer on your committee.

Save money on advertising by looking for a sponsor who will pay for the ads or by buying newspaper ads at a reduced rate on a "space available" basis. This means the ad will run, space permitting, usually within two weeks to one month. There is no guarantee when or even *if* the ad will appear—risky business if you must reach a specific market.

Public service advertising donated by the media to nonprofit organizations is not a good tool for event promotion. Again, there is no guarantee that your announcement will be used. Such ads include radio announcements, drop-in ads that newspapers use to fill space, and television video spots that are used to fill odd bits of time. Public service advertisements have to be professionally prepared and ready for use, thus adding costs to the budget, even though the ads may never make it off the shelf.

If you do plan to purchase advertising, remember to include the expense in your budget for the event.

The invitation

The invitation is that all-important chance to make a good first impression. In many cases, the invitation provides the only information on which members of your target audience will decide whether or not to attend your event.

The first step is to get the recipient to open and read the invitation instead of consigning

it immediately to the "round file" with the day's junk mail. Make the invitation look like a personal letter rather than a bulk-mailed advertisement. Always hand-address envelopes and use a stamp instead of a postage machine.

Once the potential guest has opened the envelope, the invitation must quickly and powerfully communicate the essential details of who, what, when, where, why, and how much, as well as the event theme. The way the invitation looks—"sophisticated," "important," "fun," or "boring"—often does more than words to convey the tone and character of your event. Always have invitations professionally designed and use high-quality stationery. Consult an etiquette book for proper format and language and for proper titles and salutations for your guests.

Check postal regulations for size and weight to make sure that the invitation meets standards and will require no extra postage. The post office may reject it if it is too large, too small, too flimsy, or lacks a return address.

Special delivery

Some publicity committees give invitations impact by dreaming up creative ways to deliver them, particularly to VIPs whose attendance is important. For an event with a Parisian cafe theme, a "French waiter" delivered each invitation in a basket of freshly baked croissants. An "Olympic torch bearer" brought the invitation to a fund-raising tribute dinner for an alumnus who was an Olympic champion. Creativity like this costs time and money but can also pay great dividends if the promotion is cleverly matched to your event.

Make it personal

Savvy planners ask committee members to write personal notes on invitations to encourage their friends and associates to attend. Simple lines such as, "Mary and Fred, We hope you will join us—this promises to be great fun," signed by a committee member can go a long way toward bolstering responses. The same committee members can follow up outstanding invitations with telephone calls a few weeks later.

Make it easy to say yes

A response mechanism such as an RSVP card is essential, particularly for fund-raising events. The card should list ticket levels and their costs so that guests can indicate their choice. Reply cards should also provide a line for those who cannot attend but wish to make a contribution. Always include a self-addressed envelope large enough to hold the reply card and a check.

For guests who are purchasing an entire table, provide printed lines on the back of the reply card so they can write the names of the people they have invited to sit at their table.

Save the date

In today's busy world, smart planners send out "save the date" cards as soon as they have set the date for an event. The card announces the name and nature of the event and asks the person to reserve the date. State that a formal invitation will follow. Some planners issue these cards as early as six to eight months or even a year in advance.

To VIP guests whose attendance is important, the committee chair can send a personal letter describing the purpose of the proposed event. This, too, should go out as early as possible.

The PR committee at the event

Good media coverage correlates closely with whether or not reporters had a good experience covering the event. The event PR committee should make it as easy as possible for reporters to do their jobs.

Working with the campus public relations staff, members of the PR committee can help guide the press during the event. The PR office should brief committee members and give them specific assignments. Those stationed near the door can greet media representatives, lead them to important people, make introductions, help set up photos, and provide event background information. Members should know the order of the program and the layout of the facility so that they can direct reporters to telephones or to a quiet spot to conduct an interview.

Anything that can be done to make the event and its stars more accessible will improve and increase coverage and make reporters enthusiastic about attending future events at your institution.

Hire a photographer

Hire a professional photographer to cover the event. You can use photos as keepsake gifts for volunteers, for publicity for next year's event, follow-up news releases, and in internal media such as the alumni magazine. Many planners prepare scrapbooks of events to be presented to corporate sponsors, honorary degree or award recipients, and other VIP guests.

Before the event, meet with the photographer to discuss the kind of photos you want, how you plan to use them, and whether they should be in color, black and white, or a combination. Give him or her a list of specific shots to take. Assign a PR committee member or a staff member who knows the guests to guide the photographer and to record the names of people in specific photos. Also, instruct the photographer to ask guests to put down their drinks for the photos so that your pictures don't always show people holding glasses.

Follow-up

As with every other aspect of event planning, publicity requires follow-up. Reporters who covered the event appreciate a note of thanks for their efforts. You should also evaluate which publicity techniques worked and which did not. Write an evaluation with suggestions for future events and put it in the events file.

Chapter 7

Special Events that Support The Capital Campaign

Capital campaigns present one of the most challenging and exciting opportunities in an event planner's career. Capital campaigning is *not* business as usual. The campaign stretches every aspect of the advancement program further than ever before. Integral to the campaign's success are carefully selected and positioned events directed toward many different audience segments. The event plan will be part of a massive overall public relations plan that encompasses every aspect of the institution and that should be under way as early as several years before the campaign is announced. Routine activities and events do not stop during a campaign; instead, they continue, and the campaign becomes, in effect, a job within a job.

Capital campaign planning generally follows several phases. First, the president issues a clear statement of mission. This document, which states the institutional vision for the future, is usually the result of an institutional self-study that solicits input from all members of the college or university family including the trustees, faculty, staff, students, alumni, and friends.

Next, a feasibility study, conducted with these same publics, determines whether the institution has articulated its mission and goals thoroughly enough to have earned the confidence, respect, and dollar support of its major constituents. The study reveals strengths and weaknesses and identifies areas that need more or better public relations. A feasibility study may reveal that alumni have a fuzzy understanding of the institution's goals, or it may discover a previously unknown, potential million-dollar donor. Ultimately, the study should help determine whether the institution is positioned for success in a capital campaign and what a realistic campaign goal should be.

Feasibility studies are often done by fund-raising consultants. Consultants can conduct the many necessary interviews with constituents quickly and efficiently. And because they are seen to be neutral and not part of the institution, they are more likely to get honest answers.

The first campaign-related events are likely to occur during the feasibility study. At meetings held around a dinner or luncheon in different cities and with different groups of constituents, institutional speakers make presentations about the institution and the plans under consideration. Participant reactions and advice will help determine the campaign goal.

If the feasibility study results are "go," public relations and development planning begin in earnest. The fund raisers name the target audiences, set dollar goals for them, and establish a timetable for solicitation. This timetable becomes the guiding light for events scheduling, but be forewarned that the timetable is not set in stone. It may change many times as stra-

tegies change or circumstances dictate.

During this initial planning period, campaign themes are developed and refined. Like an advertising slogan, a campaign theme should encapsulate the main idea of the campaign's purpose and motivate people to give. The theme of Baylor College of Medicine's successful $175-million capital campaign was "The New Century Campaign" to remind constituents that the money would help Baylor reach its goal of becoming a "premier biomedical research institution by the year 2000." Bowling Green State University's capital campaign was based around the school's 75th anniversary and the need to increase endowment.

The campaign theme appears in all messages, whether written, spoken, or delivered through events, and, as a result, it figures greatly in the types of events you will sponsor. Some themes lend themselves more easily to events than others. Creating events to celebrate the 75th anniversary theme was fairly easy, but the New Century Campaign theme was more abstract and a tie-in to events harder to generate.

A close working relationship between development and public relations is paramount during this period, because the campaign cannot succeed unless its messages are clearly and precisely delivered to the people who will act on them. Coordinating the many messages, the many different ways they will be presented, and the many different audiences who will hear them is a time-consuming and important job.

Special events are focal points during the campaign that highlight its beginning, significant milestones, and major donations and donors; launch various phases; celebrate its victorious conclusion; and break ground for the new buildings that are supported by it.

For this reason, special event planners should be included in campaign public relations planning at the highest levels.

Budgeting

The routine special events budgeting systems employed by many institutions—which often mean little or no formal system and even less money—are not adequate to cover campaign events. Instead, campaign events should be assigned a separate—and adequate—budget within the total campaign budget. While campaign events do not have to be opulent, they should not be meager either. All campaign events must be adequately funded, staffed, and presented in a first-class manner. There is too much at stake to risk underbudgeting.

Because capital campaign plans are subject to frequent change, it is wise to build a healthy contingency amount into the events budget in case the kickoff for 400 people becomes the kickoff for 1,000, or to cover events that arise in response to unforeseen opportunities. This is also the time to consider hiring additional events staff, including clerical staff, even if on a temporary basis.

The kickoff event

The kickoff event is the campaign's "coming out" party. It is the first time the campaign is announced publicly, and it heralds the beginning of a busy, high-profile time of heightened activity, but not the beginning of the campaign. By the time of the kickoff, the fund raisers will have been quietly working behind the scenes for months to secure major donor commitments. In fact, by kickoff, you may be a year into the campaign schedule, and a few years

may have passed since the institutional self-study.

The kickoff is a very important public relations focal point in the campaign schedule because it gets the popular bandwagon rolling and tells the world about campaign goals and objectives for the first time. The kickoff event usually coincides with a special weekend or other day when lots of people will be on campus. Because of this, the kickoff event is often the focal point of a cluster of smaller events and happenings that may or may not be campaign-related. Kickoff activities almost always include a press conference that signals the beginning of campaign publicity.

A kickoff event should meet these goals:

- publicly announce the campaign and its goals and objectives;
- explain how and why the goals and objectives were selected;
- introduce campaign leadership;
- announce the amount that has already been committed;
- build interest and enthusiasm among your constituents and the media; and
- celebrate the institution's past and future.

Some fund raisers use the kickoff to recognize major donors. Others save this information for a special recognition event later in the schedule.

There is no set formula for a kickoff event. Kickoffs should be closely tailored to the campaign's theme. The only requirements that are set in stone are that the event should communicate the campaign theme clearly, involve representatives of each of the previously identified target audiences, and have that "sizzle" that tells people the campaign is something special and worthy of support.

At Bowling Green State University, the 75th anniversary campaign kickoff began with a board of trustees meeting and a formal proclamation of the celebration of the anniversary. The next day, a football Saturday with traditional campus activities for students and alumni, ended with a black-tie dinner for a select group of potential major donors and other persons of influence. The campaign chair was formally introduced and announced his $1-million pledge.

On Sunday, the actual anniversary of BGSU's founding, alumni, students, friends, faculty and staff, and representatives from many other universities joined in a formal academic convocation. A festive but dignified event, the convocation was televised live and included a specially written brass fanfare, music sung by the university choirs, and speeches from the university president and campaign leader. The convocation was the perfect forum not only to celebrate the university's past and reveal the president's vision for the future, but also to unveil and explain the campaign goals.

Behind the scenes, the public relations staff was busy with the media, holding a press conference, arranging interviews and photos, and escorting them on campus tours.

The secret to successful kickoff events is to begin planning far in advance. In a survey of event planners conducted by Potsdam College, most said that they began planning kickoffs six months to a year in advance. And most said that if they could have done something differently, they would have started planning earlier.

The heart of the campaign

After the hoopla and glitz of the kickoff, the campaign enters the public phase. The main role of special events during this time is to support the campaign by raising awareness and building interest that is eventually translated into gifts. Like striking a gong, holding an event calls at-

tention to crucial points in time, important announcements, and special people as the campaign unfolds. Events launch regional drives, celebrate milestones toward the achievement of the goal, signal the end of portions of the campaign, and acknowledge major gifts.

Many things may take place simultaneously, and close communication between the campaign staff, public relations staff, and event planners is imperative. A victory celebration to mark the end of the faculty/staff campaign may coincide with an event to launch the drive in another region of the country. Recruitment of volunteers may be taking place in preparation for the alumni campaign at the same time you are planning for a major donor tribute event. Throughout the whole process, the schedule, which you planned months before, may be in a constant state of flux.

For event planners, accomplishing everything that needs to be done without compromising quality requires supreme organization, flexibility, and patience. Fund raisers may need to adjust the solicitation schedule because certain strategies are not working or a regional campaign ended earlier than planned and development officers are ready to move on. The importance of frequent communication between the development officers, public relations staff, and event planners cannot be overemphasized.

The president's role in events

There is no substitute for the presence of your institution's president at campaign events. But because he or she must maintain a full schedule of regular duties even in the midst of the campaign, event planners may need to make a few adjustments to help the president achieve everything that needs to be done.

How many and which events does the president really need to attend? The president's time is most effectively spent with the people who constitute the top 10 percent of prospects since traditionally that is where 90 percent of gifts will come from.

Consult the development staff to determine which events are imperative for the president to attend. Reserve these dates on the president's calendar immediately. Double-check this even if someone else has been given the responsibility. Be prompt in communicating any cancellations or changes in the events schedule.

Be considerate of the president's time. While some events demand his or her full participation, a brief appearance may suffice at others. For example, is it really necessary for the president to stay throughout an evening of speeches? Or might he or she be in attendance for crucial mingling or an award presentation and then quietly slip out?

If you are having a cocktail hour and banquet followed by speeches, you might set up the room with a walk-up podium but no dais. Seat the people who would normally be on the dais with VIP guests. The president can mingle with guests during cocktails, deliver a brief welcome after everyone is seated for dinner, and then unobtrusively leave. Because program participants are not seated "on display" on a dais, chances are no one will notice that the president has left. Do alert speakers to this plan so that they do not call upon the president during their talks.

An effective technique for smaller dinners is to have the president visit each table after guests are seated to greet people and chat. He or she can then quietly exit.

Always supply the president with a computer printout of names, occupations, and other crucial data about the people who will attend each event. Include a copy of the invitation and parking information, and note the attire. Deliver this to the president's office early enough so that he or she has time to peruse it.

For more about the president's role in the capital campaign, see Edward T. Foote's eye-opening chapter in *The Successful Capital Campaign*, edited by H. Gerald Quigg and published by CASE.

Victory!

Finally the day comes when you have reached or exceeded the capital campaign goal, and you have the pleasure of planning a celebration. While the type and format of the victory event will be unique to your institution, it should communicate the campaign theme and be a first-class affair, the nicest you can afford.

The victory event is not a time for the development or public relations staff to pat themselves on the back, but rather it is a special occasion sponsored by the institution to say a public "thank you" to the donors, volunteers, workers, and media who made the campaign a success. People like to be associated with a winner, and this will enable everyone who participated in the campaign to bask in the limelight and take a bow. So make this event sparkle.

A victory event should accomplish the following:

- feature and thank the campaign leaders;
- recognize and thank major donors;
- thank volunteers and workers;
- state once again the purpose and mission of the campaign;
- provide an update on the progress of campaign projects such as building construction;
- lay the foundation for continuing giving and involvement.

In addition to a large victory event, you may also want to hold smaller, more personal celebrations for selected groups such as top donors, volunteer leaders, and faculty and staff. The bottom line is to recognize and thank everyone in some way—you can never say "thank you" too many times.

The real harvest of a capital campaign comes from the continuing involvement of the new friends you've made along the way as well as the continued support of old friends. People who have become involved during the campaign, either as donors or as volunteers, should be invited to events in the future, particularly groundbreaking ceremonies or building dedications. Include on the guest lists for such occasions donors to academic programs that sponsor lecture series, guest performances, or open houses, or that have friends groups.

A final report

The campaign manager will prepare several final reports, including one for internal use and one for the public. A comprehensive, confidential campaign special events report should be part of the internal report. The public report should feature photos and pertinent information about major campaign events.

The internal special events report should include a budget analysis, a narrative about the types and timing of events and the audiences they served, and the names of major donors and volunteers. Ten years before the 75th anniversary campaign at Bowling Green, the event planner filed an excellent report at the conclusion of the university's only other capital campaign. This report was the only surviving comprehensive campaign record, and it provid-

ed an invaluable road map to people and ideas. Event planners for the anniversary celebration were able to involve people who had helped before, including the man who eventually became the campaign leader and made a $1-million gift.

Chapter 8

Fund-raising Events Require an Action Follow-up

Planning for fund-raising follow-up should begin in the early days of an event's development. No event can be considered truly successful without effective follow-up. After all, whether an event is for cultivation or fund raising, its reason for being is to make money for the institution.

Ironically, the lack of a solid plan for fund-raising follow-up is a common fund-raising mistake. Too often fund raisers are so relieved to have the event behind them that they are tempted to sit back and relax just when action is most needed, and they neglect to ask for the gift.

If an event is not followed up in a timely and appropriate fashion, the money and time invested in planning and holding it have been wasted. Failure to follow up is like writing and printing a direct mail appeal but never mailing it.

While each event has a place in your development master plan, each event also has a life and timeframe of its own. Therefore, each event requires a carefully crafted follow-up that will lead you and your constituents smoothly into the next step in the fund-raising plan.

At a midwestern university, the campus center for the musical arts was nearing its 10th anniversary. When the center was built, an aggressive fund-raising campaign produced monies for enhancements such as a performance auditorium. Planners felt that the anniversary was an appropriate time to seek new donations for refurbishing and additional equipment. The development office special event planner began to plan a cultivation event that would highlight the anniversary and the accomplishments of the previous 10 years, feature future goals, and lay the foundation for a fund drive.

The event was a success—or so it seemed. It was one of the highlights of the social season, it was well-attended, and it received excellent media attention. Guests were entertained, wined and dined, and told about funding needs. But no money was ever raised as a result because no fund-raising follow-up had been planned. Because the fund raisers weren't ready to implement an action plan immediately following the event, the anniversary year passed and the opportunity to capitalize on it was lost.

Follow-up begins during planning

Development strategies should take shape during the planning of an event. This is why event planners and development officers must work closely together. Development officers should

have input about the guest list from the earliest days; they should know who the corporate sponsors are; and they should already be working to find ways to reinforce the fund-raising message and to secure gifts. The development officer assigned to the event should craft any fund-raising messages to be delivered during the event and determine what, if any, fund-raising materials will be distributed.

After a cultivation event. Plans for fund-raising follow-up after a cultivation event should include:

- designating a development officer to be responsible for the process;
- setting goals for the amount to be raised and a timetable on which to do it, including selecting dates for additional events if needed;
- preparation of all printed materials in advance;
- identification of prospects, including appropriate research into their giving histories and potentials;
- assigning prospects to development officers;
- plans for soliciting people who will not receive personal calls, including plans for direct mail or telephone follow-up; and
- the commitment to see the drive through until all prospects have been contacted, their gifts receipted, thank-you's sent, and a final report filed.

In the case of the musical arts center, the development staff should have had a well-conceived strategy with potential donors identified and supporting materials ready to go the following morning. They should have begun making calls and collecting pledges while the euphoria of a wonderful evening still lingered and the fund-raising message was fresh in the minds of participants.

After a fund-raising event. Plans for follow-up after a fund-raising event should include:

- designating a development officer to be responsible for the process;
- a plan for ways to continue to meaningfully involve the donors and volunteers who took part in the event;
- research into the interests and giving potentials of newcomers, including plans for nurturing their interest and building their involvement;
- the commitment to ensure that gift receipting and acknowledgment procedures are followed properly and in a timely manner; and
- the personal touch (extra phone calls or handwritten notes) that goes beyond standard institutional thank-you procedures for major individual and corporate sponsors and for volunteers.

The nuts and bolts of follow-up

Once the event is a "wrap," the event planner steps aside, and the baton passes to the development staff. But first, in addition to regular event follow-up procedures, planners must make sure the development staff have all of the information they need to get their jobs done.

On the first working day. Give the development staff a final roster of guests. If the event was for cultivation, supply a list broken down as follows:

- people who attended;
- people who made reservations but did not come;
- people who sent regrets; and
- people who made no response.

If the event was a fund raiser during which money changed hands for tickets sold at the box

office, for a raffle, or for an auction, supervise a proper accounting and make sure that the money is safely deposited.

Occasionally, the winning bidders for silent auction items leave the event before the bidding closes. If this is the case, call the winners and make arrangements to deliver the items or have them picked up. At the same time, give the purchasers information about the forms of payment you will accept and tell them that items must be picked up and paid for by a deadline or the next bidder will be given the chance to purchase. Make arrangements to have large items delivered immediately so that you are not held liable for storage costs and insurance.

Release the follow-up publicity and write thank-you notes to the key people who helped make the event a success. This includes the speaker and all platform or dais participants, committee leaders, the caterer, and the facility manager. If a student organization provided workers or performers, send one note to the group's president that can be read at its next meeting.

While the event's floral arrangements are still fresh, send them to high-traffic offices on campus or to local nursing homes or the hospital. Send any extra food to the local food pantry or soup kitchen.

Telephone the event chair and other key people to get their reactions and to thank them for their help.

Double-check that all equipment (rented, borrowed, and your own) has been properly returned in good condition, cleaned and ready for the next use. Order any needed replacement parts or repairs.

Within the week. If the event was a fund raiser, generate a list for your event file of people who bought tickets and at what level, the names of corporate sponsors and the amount or type of gift if it was a gift-in-kind, the names of people who purchased tickets as a donation but did not attend, and a listing of regrets and no replies.

Schedule a wrap-up committee meeting to collect all files, office supplies, and outstanding bills and to gather everyone's opinions and suggestions. Ask each of the volunteer committee chairs to file a report making suggestions for improvements in his or her area.

Follow up with the campus news service or public affairs office to be sure that post-event publicity is handled according to plan.

Submit all invoices to the financial officer responsible for paying bills. Verify charges against arrangements orders to be certain you were billed based on guarantees, not estimates. Keep copies of all receipts and invoices for the event file. Double-check that speakers' honorariums were paid.

Bill any guests who attended but didn't pay.

Write thank-you notes to everyone who volunteered as well as to your staff and co-workers. If your volunteer structure is too large for you to accomplish this alone, gather your committee chairs for a note-writing party. Make sure no one goes unrecognized. Behind-the-scenes people, like university security, ground crews, and the florist, appreciate thank-you's and will be all the more willing to provide good service in the future.

Within the month. For both cultivation and fund-raising events, prepare a follow-up report that describes every aspect of the event in detail. Refer to the original goals and objectives that you set in phase one of planning. Did the event meet its goals in friend raising, fund raising, and public relations? Did it draw the target audience? Was the intended message clearly and decisively delivered? If it was a cultivation event, did it provide enough information and foster enough good will so that when a development officer calls, the potential donor will be receptive to the request? What would you do differently next year? What would you do the same?

A financial report is essential for either kind of event, but when the event was a fund rais-

er, this report is the acid test of whether or not you succeeded. It should include an income statement and a balance sheet and give the names and gift amounts of all patrons and sponsors.

If your analysis shows that the event did not meet its goals or did not generate the funds you had hoped for, find out why. Ask people you trust to give you an honest assessment. Investigate until you can pinpoint problem areas to correct or avoid in the future. This will tell you if problems were major (a poorly focused message, for example) or minor (low attendance caused by bad weather).

Reinforcing your message through special follow-ups

Successful events open doors and establish relationships that no other public relations tool can. The chance to work together with people one-on-one through your volunteer network and to meet new people at the event itself affords a unique opportunity to build genuine, lasting friendships for your institution. The challenge after an event is to keep the doors open and the friendships growing.

Because volunteers and friends have made an emotional investment in a project they have helped support, keep them involved after the event is over by posting them frequently on the status of the project. If the fund-raising event raised money to construct a new facility, invite volunteers to a talk by the architect and a hard-hat inspection as soon as there is something to see. Remember to invite all volunteers and donors to events such as groundbreakings, dedications, and open houses. If your event raised funds for scholarships, invite the donors to an afternoon coffee with the scholarship students.

Host a volunteer appreciation party to thank those who helped and to give them a final report on the event. If you kept a scrapbook or photo album of the event, pass it around for all to enjoy. Such a gathering gives people a sense that the project had a beginning, a middle, and a conclusion, and also serves as a primer to introduce the next event for which you need their help. When you tell people the results of their hard work, you are also telling them that you respect the gifts of time and talent they have given.

Be honest about whether the fund-raising goal was met. Whether or not the goal was met, be lavish with thanks and praise for the volunteers' help. Give each volunteer a small token of appreciation such as a memento of the event or of your institution; give individual recognitions to key volunteers.

If you cannot afford to host a gathering for volunteers, prepare a brief wrap-up letter and mail it to each volunteer with a copy of a newspaper clipping and a hand-written "thank you" in the margin.

Above all, don't let an entire year roll by before having another contact with these people. Find ways to stay in touch through mailings and invitations to other college or university events so that you don't have to start from zero next year.

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These books and periodicals have information that is pertinent to special event planners. Some are invaluable "how-to" manuals that can lead you step-by-step toward success. Others can serve to fill the information gaps that sometimes exist between fund raisers, alumni administrators, university relations professionals, and event planners. This list should not be considered all inclusive. Rather, it represents a collection of resources that I have found to be helpful.

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With the approach of Bowling Green's 75th anniversary in 1985 and the announcement of a capital campaign, Harris became associate director of development for public relations. She served as a key member of the planning committee for the university's year-long anniversary celebration and was responsible for capital campaign public relations and special events planning.

At Baylor, she is managing editor of the college's national publication, *The DeBakey Heart Center Health Letter*, and project director of the "We Care For You" public health education series. She was formerly a member of Baylor's alumni and development staff and was a silver medal winner for direct mail fund raising in CASE's 1989 Recognition Program.

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